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SPECIAL ISSUE

# Forbes

INVESTMENT GUIDE

81 NEW WAYS TO

# GET RICH

FROM DO-IT-YOURSELF FUNDS  
TO LEGAL TAX DODGES, THE  
ULTIMATE BATTLE PLAN  
FOR YOUR CASH



# Chicago Financial

Whatever your short- or long-term goals, Chicago's financial experts are prepared to help you get your money on the right track and keep it moving forward.

## Featured Companies

**World Equity Group**  
www.worldequitygroup.com

**The Barrett Group of Wells Fargo Advisors**  
www.barrettgroup.wfadv.com

**Horvath Planning & Wealth Management**  
An Office of MetLife  
www.horvathwealthmanagement.com

**Goldstone Financial Group**  
www.GoldstoneFinancialGroup.com

**Caldera Investment Group**  
www.calderainvestmentgroup.com

**Shallcross Financial Planning**  
at Lincoln Financial Advisors  
www.darrinshallcross.com

**Omni Wealth Management Group**  
at UBS Financial Services Inc.  
www.ubs.com/team/omni

## Times Like These Call for Goldstone

*Goldstone Financial Group Provides Financial Solutions*



GOLDSTONE  
FINANCIAL GROUP  
PRINCIPALS

Anthony  
Pellegrino (left)  
and Michael  
Pellegrino

While cruising down the road to retirement, there's one question everyone needs to stop and ask: Am I going to have enough money to live on?

The answer depends on how you live, how much money you have, and who you have managing that money.

Goldstone Financial Group advises clients at all stages of retirement planning, from pre-retirees to those who have already retired. Anthony and Michael Pellegrino, partners in the firm, are dedicated to creating lifetime guaranteed\* income streams for their clients by using financial plans that are systematic. "The biggest issue for retirees is having consistent income that assures they won't run out of money," says Michael. "We address that by covering everything from growth to principal protection to securing a lifetime income stream."

### Protecting Principal, Generating Growth

"We believe that not losing money is just as important as making money," says Anthony. "But at the same time we work to grow capital. Our specific strategies help clients generate growth in all types of markets: down, flat and up. If the next 10 years are as volatile and uncertain as the last 10 years, people are going to need help to stay ahead. That's what we specialize in. We bring current, fresh and evolved approaches that are relevant to today's financial world."

### Offering a Lifetime of Income-Planning Solutions

Anthony and Michael share their expertise with radio listeners throughout Chicago. They host *Securing Your Financial Future* Sunday mornings on WLS AM 890. For the last four years the program has been one of the most listened

to financial radio shows in the area according to Arbitron, Inc. rankings. In addition, Goldstone hosts a number of workshops for prospective clients or anyone interested in learning more about investing or retirement planning. (See the Goldstone website for information about dates, times and how to attend.)

### Recognized as a Leading Wealth Manager

As a testament to their hard work, knowledge and service to clients, Anthony and Michael were recently named 2011 FIVE STAR Wealth Managers<sup>SM</sup> for the second consecutive year. This designation was awarded to less than 2 percent of all wealth managers in the Chicago area. As a firm, Goldstone has earned an A+ rating from the Better Business Bureau and is an approved member of the National Ethics Bureau.

"We like it when we can sit down with clients and show them how they're currently positioned, and educate them on what they could be doing," says Michael. "There's nothing like the 'aha' moment when clients say, 'I didn't know options like these were available to us.' We enjoy bringing peace of mind to clients who were previously unaware of all the possible solutions."

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— FINANCIAL GROUP —

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