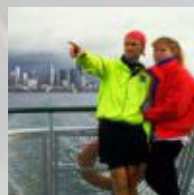
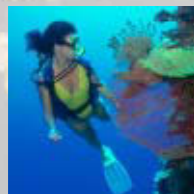




thebucholtzgroup

Helping Clients Make Smart Financial Decisions

painesville, ohio 44077



davebuc@noweb.com



**we help clients make smart financial decisions**

# the bucholtz group

But first we **need** to know what our clients care about and what they want.

What matters most to you? Being able to retire or work less when you want to? **Establishing** and growing your own business? Making sure your children can get a college education? Traveling and taking vacations more

often? Being smart with your money and doing the best with what you have? Being **able** to sleep at night knowing your investments are well diversified?

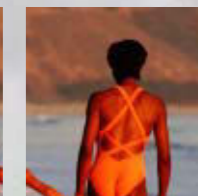
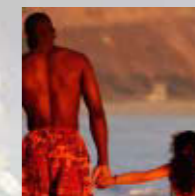
The Bucholtz Group can **help** you get there. Buy why should you choose The Bucholtz Group? After all, you have so many choices...

Stockbrokers. Insurance agents. Bankers. Other financial advisors. You can even **decide** to "go it alone" and use financial magazines like "Money" and Kiplinger's" and do-it-yourself websites like Charles Scjhwab and E-Trade.

So why should you **choose** The Buchlotz Group?

• 440.352.6717

440.352.4394



- Our financial plans and investment **strategies** are tailored to our clients' unique needs and circumstances. We do not use "cookie cutter" or "one size fits all" financial plans or investment portfolios.
- We **evaluate** your situation before we make specific recommendations.
- We construct a written financial plan so that **progress** can be measured through regular reviews.

- We believe that taking **action** on recommendations determines the success of our clients.
- We believe that working **together** over a long period of time leads to our clients' success.
- We **believe** that taking action determines the success of our clients, not just completing a plan.
- We conduct a free initial interview to determine if there is a **fit** between what the client needs and what The Bucholtz Group provides.

- We refer clients to **specialists** such as attorneys, accountants, bankers and insurance agents when needed.
- We structure our fees so that The Bucholtz Group is able to **provide** ongoing, superior service.
- We consider your **entire** financial situation, not just one particular area.
- We take **personal** interest in the success of our clients.

the bucholtz group

180 south state street • painesville, ohio 44077-3415 • davebuc@ncweb.com

**is unique in how we work with our clients.**



davebuc@ncweb.com

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● painesville, ohio 44077

180 south state street



# the bucholtz group



danbucholtz@cbweb.com



**provides comprehensive  
financial planning and investment services**



440.352.4394

● 440.352.6717

We provide guidance and direction in the following areas:

- Investment management
  - 401(k) rollovers, Roth IRA's, TSA's, 403(b)'s, Simple IRA's
  - Fee-based investment management and diversification
  - Access to over 4,000 mutual funds
  - Individual stocks and bonds
- Comprehensive financial planning
- Tax planning and reduction
- Retirement planning
- Estate planning
- Budgeting, cash flow, and debt
- Life, health and disability insurance evaluation
- College funding
- Small-business owners consulting
  - Retirement or Pension Plans
  - Benefits analysis and comparison
  - Succession planning



# Do you need...

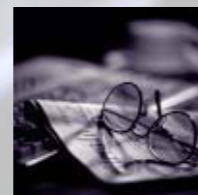
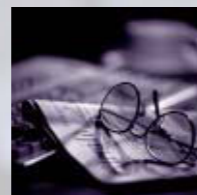
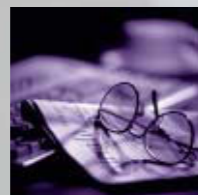
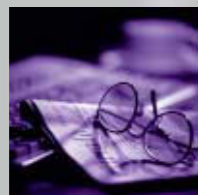
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## the Bucholtz Group?



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- Do you have the **knowledge**, the discipline and the time to effectively manage all of your financial affairs?
- Do you have the **time** to meet with your banker, life insurance agent, accountant, attorney, stockbroker, and property and casualty insurance agent as often as you should?
- Are you **certain** your investments are diversified properly?
- Are you actively **looking** for (and using) methods to reduce your tax burden?
- Has the tremendous increase in **information** available through television and the Internet actually made it easier for you to make good financial decisions and to take action?
- Do you honestly believe that you can get and use **effective**, personalized and timely investment management and financial planning help by surfing the Internet, watching TV, and a subscription to a financial magazine?



The Bucholtz Group is committed to making your financial life easier to manage, easier to understand, and more successful.

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We are **committed** to becoming your trusted advisor.

We help our clients make **smart** financial decisions. But the first decision is all yours.

Contact The Bucholtz Group to set up your **free** initial appointment.



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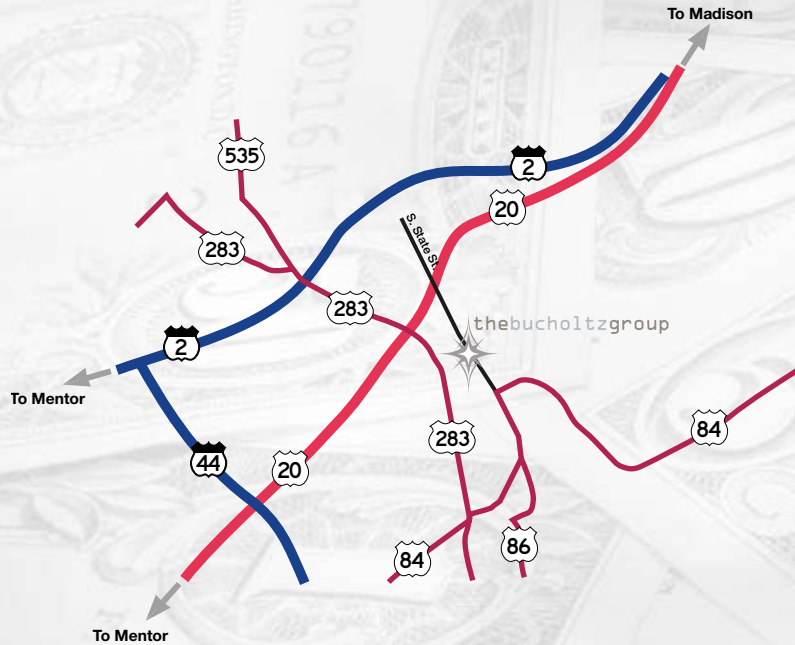


Dave Bucholtz, CFP is the owner and **principal** of The Bucholtz Group. Dave graduated from Ohio State **University** in 1992 with a degree in business. He joined The Blakely Associates, Inc. in 1992. Dave migrated away from insurance work and into **comprehensive** financial planning. Dave began working with clients for financial planning and investment **management** in 1995. He started work on the Certified Financial Planner designation in 1996 and **successfully** passed the certification exam in 1998. He founded his own financial planning practice in June of 1999. He lives in Painesville Township with his wife Kris, **daughter** Emily, son Jared, and black lab Gus.

He is currently **writing** a book that details the principles that he uses in his practice and why most individuals **need** a financial planner. The book also spells out why most individuals need a financial planner.

Dave says, "I love what I do. I act as a guide or a coach for my clients. I am able to help them from **making** the mistakes that others make, and I'm able to keep my clients **focused** on the issues that really determine success. We measure their progress over time so that they can actually see how far they have come. It's a great feeling."





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