Lucia Reynolds, *Financial Advisor*
(Bilingual Spanish)

Financial Advisor Background - Lucia has an exceptional 32 years of experience working in the Financial and Tax Industry. Prior to becoming a Financial Advisor, Lucia worked as a Corporate Auditor for The Internal Revenue Service for 10 years and also has credit management experience. She has a wealth of diverse knowledge to help clients develop their financial plan.

Lucia Reynolds holds a Bachelor's of Science degree in Industrial Management with an Associate's degree in Accounting. Other certificates include Financial Divorce Planning through the divorce planning association and an earned Bachelor's degree in Business Management and continuing education.

Licenses

- *Registered Securities Representative*
- *Investment Advisor Representative*
- *Licensed Insurance Agent*
- *Enrolled Agent (EA) Tax Preparer to represent taxpayers before the IRS*

Community Involvement – Lucia is currently a Board Member of Los Ninos Cuentan, a non-profit organization for domestic violence survivors. She's a devoted volunteer with a great heart to help the organization be successful helping in various tasks such as finances, management, leadership and more. Lucia is also actively involved in other non-profit organizations within the community and cares about the well being and success of others.

LUCIA REYNOLDS
AMERISAL FINANCIAL, INC.
9221 SW Barbur Blvd #310
Portland, OR 97219

Also doing business in the Naples, FL area!

How to achieve financial security:
- *Eliminate debt*
- *Control spending*
- *Increase savings*
- *Retire in style*

Disclosure: No strategy assures success or protects against loss. Investing involves risk, including possible loss of principal

AMERISAL FINANCIAL, INC

Strive towards growing and securing your investments through professional wealth management!

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About Amerisal Financial, Inc.

Amerisal Financial, Inc. is an independent, financial services firm founded in 2007 by Lucia Reynolds. The corporation is located in Portland, OR with clients in several states.

Amerisal Financial offers services to individuals as well as small business clients with a focus on Investment Portfolio Management, Personal Financial Management, Life Transitional Planning such as retirement and divorce, etc.

The relationships that we develop with our individuals and business clients help them understand the fundamentals of sound financial management such as:

- Wealth Preservation
- Liquidity
- Diversification and Asset Allocation
- Financial Planning

Understanding Investing

A crucial part of our investment philosophy is helping clients gain a solid understanding of their investment planning. We advise clients the best strategies to maximize profit and minimize risk when investing in Stocks, Bonds, Closed End Funds, Exchange Traded Funds (ETFs), and Municipal Funds.

Our investment strategy is based on two principles: Value and Income Investing. We employ an interactive approach: continually monitoring the market, analyzing performance, and tailoring strategies that seek optimal returns.

Planning Your Financial Journey

Managing your wealth is like planning your life journey. At Amerisal Financial, Inc. our goal is to offer objective guidance and feedback through your journey with wealth management.

We work with clients to help them navigate through life transitions that may cause turmoil or uncertainty. We can help prevent those unrealistic financial decisions in such instances and help you carefully strive towards financial independence. At times even positive life changes can be stressful without support or knowledge to work towards your financial goals and that is why we are here to help!

Here's How it Works:

1. **Discovery Process:** Where do you stand financially? What are your assets and how much debt do you have? We focus on the big picture analysis to assess client's wants and needs.

   We conduct a financial assessment through a cash flow analysis, planning questionnaire, and budget. With the information the client's provide, we evaluate and help them gain a clear understanding of their financial situation.

2. **Set Your Goals:** Setting short and long-term realistic, financial goals will empower you. Tell us about your dreams so we can help you get one step closer to achieving those dreams through your path of careful financial planning and decision making.

3. **Develop A Realistic Plan:** We help you establish a tailored financial plan with a diversified portfolio to aim towards your goals and dreams.

4. **Implement The Plan:** We work with you every step of the way to advise, assist, and guide you in moving closer to your goals with financial discipline. We are here to help and not only give guidance but also feedback. We want you to take charge in implementing the tailored financial plan.

Talk to Us

Ongoing communication is a vital part of helping our clients work towards their personal goals. We strive to build long-term, personal relationships with all of our clients. Tell us of your changing needs, and we will recommend plan adjustments to reflect your current situation.

Principle

At Amerisal Financial, Inc. our commitment is to add value to each client's relationship through hard work, discipline, integrity, and of the highest ethical standards.

Give us a call today at 503-344-4422 or 503-888-4088 to set up a free, no obligation, introductory, one-hour consultation. We look forward to meeting you!