



www.waterstonewealth.com



- Retirement Planning
- Estate Planning
- Charitable Giving
- Insurance
- 401(k) Rollovers
- Advisory Services*

918 – 272 - 1120

“Advisory services and Securities offered through LPL Financial Member FINRA/SIPC”



THE WALL STREET JOURNAL.



It Matters!

Where You are Invested

Who You Trust

What Strategy you use



Volatility



Source: FT.com

The S&P 500 is an unregulated index which can not be viewed as directly being performance by no guarantee of future results.



Perspective

10 Year S&P 500 Index



Source : Thomson Reuters via LPL Research;
The S&P 500 Index is a non managed index
which can not be invested into directly. Past
Performance is no guarantee of future results.

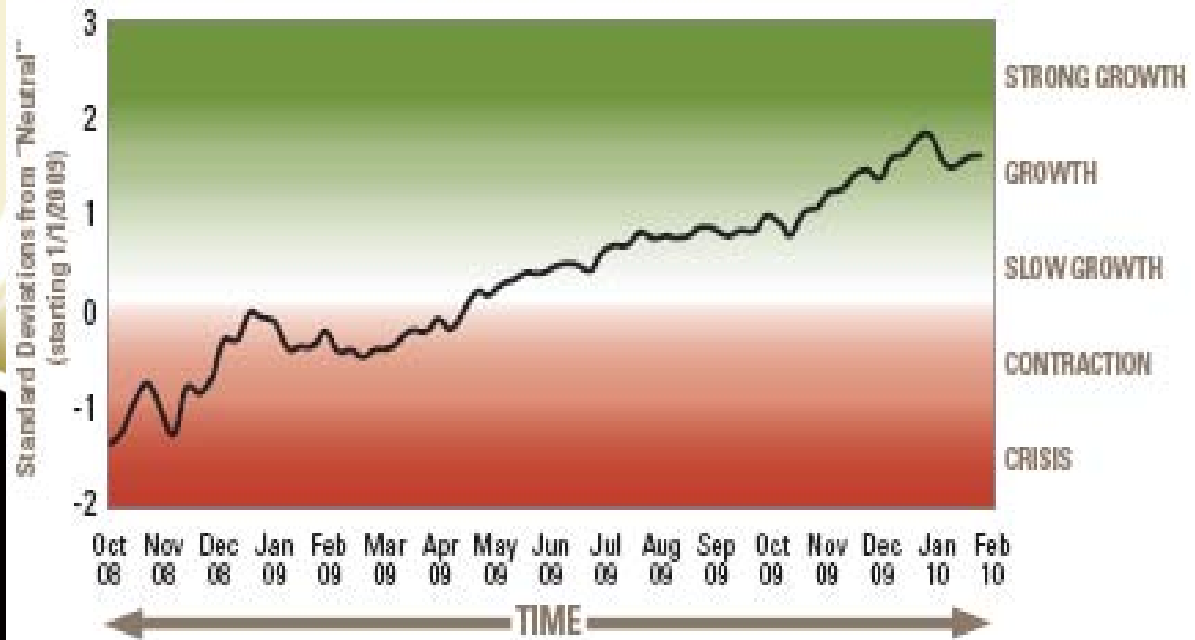


"Securities offered through LPL Financial Member FINRA/SIPC"

Action Plan

- Become Informed
 - Stress Test your Portfolio
 - CCI

LPL Financial Research Current Conditions Index



Source: LPL Financial



Action Plan

- Become Informed
 - Stress Test your Portfolio
 - CCI
- Personalized Strategy





www.waterstonewealth.com



Two Locations:

Owasso

9500 N. 129th E Ave
Suite 106

Tulsa

1709 Utica Square
Suite 266

918 – 272 – 1120

1-866-Roll 2 us

765-5287

Powerful Strategies

Personalized Advice

Uncommon Service

Disclosures & Disclaimers:

- Securities and advisory services offered through LPL Financial, Member FINRA/SIPC. Stock investing involves risk including loss of principal. The opinions voiced in this material are for general information only and are not intended to provide specific advice or recommendations for any individual. To determine which investment(s) may be appropriate for you, consult your financial advisor prior to investing. There is not way to know what will occur in the future. Ken is a registered representative with, and securities offered through LPL Financial Member FINRA/ SIPC.
- S&P 500 is an unmanaged index which can not be invested into directly. The stated values for the index reflects the average value of 500 preselected equities' daily value and tracked over time. This is not a specific stock that an investor can invest directly in but is available through select mutual funds and Etf strategies. Past performance is no guarantee of future results. Investing involves market risk and there is no guarantee any objective will be met.
- Distances referenced for Market Volatility were for demonstration purposes only and are not reflective of actual movement or relocation of individual investors or the markets specifically. Distances were gathered from Mapquest general descriptions and are not reflective of specific itinerary planning. For demonstration purposes only.
- The source for the average daily temperatures for Maui and Death Valley were researched in the Farmer's Almanac and are not reflective of a specific forecast for either geographic areas. Examples used for demonstration purposed only.
- All investors should seek professional advice before investing. The material presented in no manner is represented as specific investment advise for any individual to act upon. For general information purposes only. Each individual's situation varies so different strategies may be appropriate for different individuals. No strategy ensures a profit or protects against loss.



www.waterstonewealth.com



- Retirement Planning
- Estate Planning
- Charitable Giving
- Insurance
- 401(k) Rollovers
- Advisory Services

918 – 272 - 1120

“Advisory services and Securities offered through LPL Financial Member FINRA/SIPC”