

B.A.L.L. For Life

Invest in your financial success!



Overview

- Investing
- Life Insurance
- Benefits of Homeownership



Investing

Investment advisory services offered through CWM, LLC, an SEC Registered Investment Advisor. Carson Partners, a division of CWM, LLC, is a nationwide partnership of advisors.



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What is an Investor?

An investor is any person or other entity (such as a firm or mutual fund) who commits capital with the expectation of receiving financial returns.



Examples of things you can invest in:



Stocks vs. Bonds

Equity Investor: Stock
% Ownership & Business Growth

Debt Investor: Bonds
Promise to Pay with Interest

Stocks:

Bonds:

More
Intraday
liquidity

Equity in a
company

Usually
trade OTC

Debt of a
company

Perpetual
by nature

Can
appreciate
in price

Have a set
maturity
date

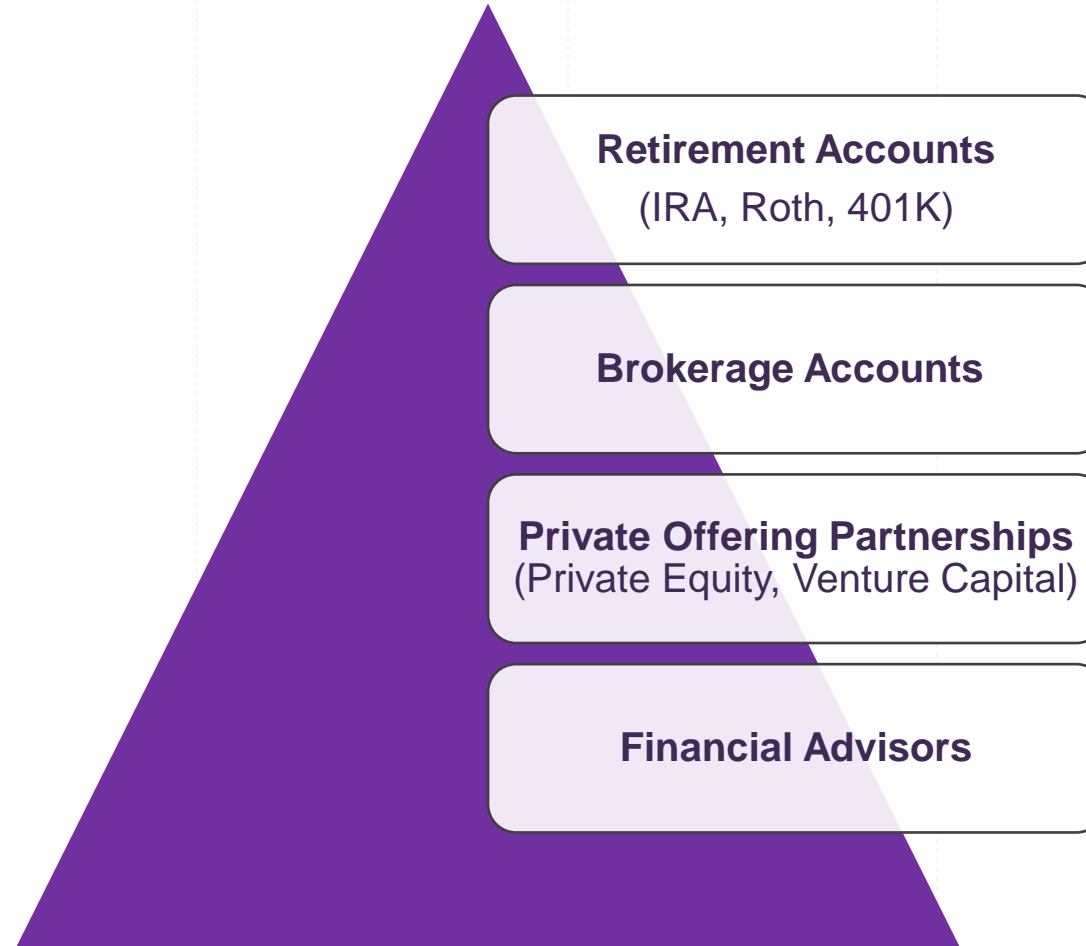
Can
appreciate
in price

Can pay
dividends

Can pay
interest



Ways You Can Invest:

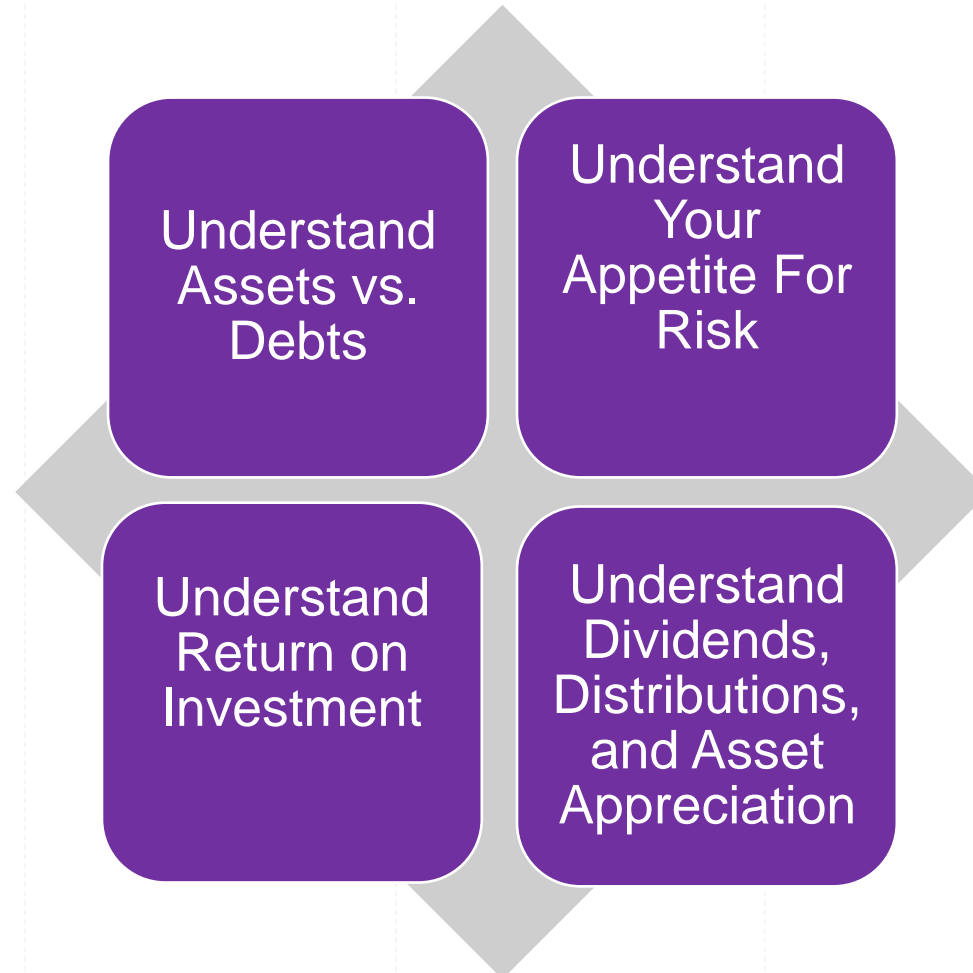


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Tips for Smart Investing:





Life Insurance

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Permanent Life Insurance

Whole life insurance:

This type of policy lasts for the lifetime of the insured party. It pays a death benefit but also has a savings component that lets cash value build, which allows you to take out a loan against your payout amount.



Term Life Insurance

Term Life Insurance:

This type of policy lasts for a set period of time. It pays your beneficiary a death benefit if the policy is still active when you die.





Homeownership

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Benefits of Homeownership:

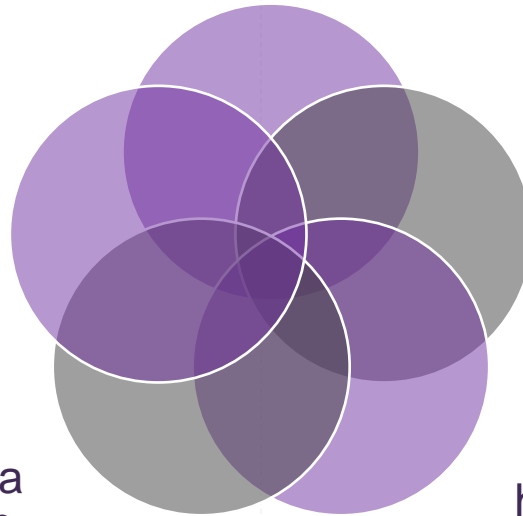
You'll build home equity with each monthly payment

You'll build credit

Your home value will rise over time

You may get a tax deduction

You can use home equity to build wealth





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