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Greater Columbia BUSINESS MONTHLY

COVERING THE MIDLANDS

PRESERVATION SPECIALISTS GIVES RETIREES PEACE OF MIND



Pat Strubbe, owner of Preservation Specialists, LLC, says there are two kinds of financial planners – the “accumulation” planner and the “protection” planner.

“A stockbroker may help you accumulate a nest egg but rarely offers advice on how to withdraw funds or pass them on to your heirs,” she explains.

“We call ourselves protection planners because of our focus on the most critical areas of planning in the retirement years – protecting your assets from nursing care spend down, avoiding or reducing the time and cost of probate, reducing tax liability, and reducing hidden fees of mutual funds. In a nutshell, we focus on getting a good return, reducing risk, and reducing taxes.”

Pat explains further: “Although we are fully licensed in all areas of financial planning, we know that attempting to be all things to all people is impossible. That’s why we concentrate our efforts

on retirement planning. We work hard to be educated on all issues that affect retirees, and we also work hard to educate our clients as well.”

“People very close to retirement face one of the biggest changes in their lives,” Strubbe adds. “They are going from having a regular paycheck to living off their savings. We help them develop a financial game plan so they can sleep at night knowing their income is still secure.”

Preservation Specialists is so confident in their planners’ ability to save their clients’ money that the company offers clients a “Thousand Dollar” guarantee.

“At Preservation Specialists, keeping our clients happy is our number one concern,” Strubbe explains. “We promise that anyone we accept as a client will save at least \$1,000 in taxes and fees. If we can’t save them that much in taxes, we’ll pay it to them ourselves!”

“Most of our potential clients start off by attending one of our workshops. To all who attend, we normally offer a free 60-minute meeting,” he continues. “The purpose of this meeting is to answer any questions a client may have and to see if our service can be of value to him or her. If everyone agrees that the services we provide are indeed valuable, then we schedule a second meeting.”

To find out more, those who are interested may attend one of the firm’s free educational workshops. These workshops are designed to help people learn about saving money on taxes and investments. After the workshop, attendees are invited to enjoy a free gourmet meal.

Dates and locations of upcoming workshops are listed on the Preservation Specialists’ website at www.scpreservation.com. You also can request information by calling the company’s main office at (803) 798-1988. ■



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