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More for You, Less for Uncle Sam

Mike Martin Financial Group Knows It's Not What You Make, It's What You Keep

Few financial issues are as complex as the tax implications of investing for retirement. And few things are as important to actual retirement wealth than the way taxes are addressed. Simply put, taxes matter immensely, and have a sizable effect on every person's retirement.

So when it comes to tax management from investment professionals, good enough isn't good enough. You need a specialist. And fortunately, one is available right here in the Kansas City area: Mike Martin, president of Mike Martin Financial Group (MMFG). You could say Martin wrote the book on the subject. In fact, he has written 30 books on taxation, one each of the past 30 years as part of a training course he has taught annually to 250 area tax professionals. No wonder he's known as the "Tax Pro to the Tax Pros."

Martin has 40 years of experience working with investments and taxes. He is currently a Registered Financial Consultant, an Accredited Tax Advisor and an Enrolled Agent licensed to represent individuals in tax hearings before the IRS. As a financial tax advisor, he helps MMFG's clients see that both aspects of their finances are up to par, with the goal of saving on taxes as they earn on investments.

A Bigger Share for Retirees

"We help our clients keep Uncle Sam's share of their retirement savings at its lowest legal limit – giving them a greater share of their financial successes," says Martin. "We think that keeping what you earn is as important as earning it in the first place. We are a complete financial services provider, and we help clients retain their success in the market by using our experience in tax law. We offer both taxation and financial services."

Front Row: Karen Zurcher, Debbie Rogers, Scott Schulze, Mike Martin
Back Row: Tim Moore, Melissa Byrd, Brett Brennan

As an independent firm, MMFG is able to provide certain advantages to its clients. Because it is not limited to products presented by one national firm, it has access to a universe of funds from well known money managers such as Vanguard, JP Morgan and UBS and Russell, to name a few. In addition, MMFG has its own "Private Client" strategies that incorporate products such as ETFs, no-load mutual funds and individual stock holdings into portfolios managed according to clients' needs.

Investing With a Mind for Taxes

"One of the things that sets us apart is we do the tax planning before the investment is made," says Martin. "This eliminates surprises and helps avoid big tax mistakes. Unlike many financial advisors, we have the ability to apply sound tax judgment to every retirement strategy."

As a boutique firm, MMFG provides first-class, individualized attention. The whole staff is in a position to know its clients, as well as their account service needs. The firm serves a diverse group of clients, holds licenses in many states and is proud to provide financial advice and service to individuals of all backgrounds and income levels.

After all, it's your money. You've worked hard for it and deserve to keep as much as possible. Mike Martin Financial Group is uniquely qualified to show you how.