## Script: Individuals and Families V.2

Target Audience: Prospects, Clients, COIs
Estimated Total Runtime: 2:15
Strategy: Post on website landing page, social media, send in email

[Dave]
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What keeps you up at night? Chances are most of what you're lying in bed contemplating has a central theme – money and the future.

While we don't have a crystal ball, my partner and I each have more than 30 years of experience in the financial industry – along with time-tested strategies, which can help align your risk and your needs.

At Apex Securities and Asset Management, we work with a variety of people – from single people just starting out, to families, to retirees and widows.

We take a comprehensive, holistic look at your financial goals and needs. We look at your liabilities – and everything from your taxes, insurance coverage, healthcare, to college education for your kids or grandkids. We take into account all the things you worry about – and the things you don't.

We've seen mistakes that can be made – and the unexpected landmines – someone gets sick, an elderly parent moves in – there are so many scenarios that you just don't think to plan for. We're here to help you look out for those.

We understand that creating a plan can feel overwhelming. The good news is, we don't have to implement everything tomorrow. We work at your pace and follow your lead.

First, we want to get to know you as an individual; to uncover what's important to you – your values, goals and aspirations.

Paint us a picture and we'll show you the plan.

Ultimately, our focus is what makes you happy – and how do we get you there. How do you envision retirement? Do you want to volunteer? Play pickleball? Coach little league? Are you seeking to maintain your current lifestyle now and into the future?

We can't guarantee you'll never have another sleepless night, but maybe those nights will be spent planning your next family vacation – not how you're going to pay for it.

**Your life path is a series of transitions – let Apex be your guide. We can help get you to your destination.**

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