

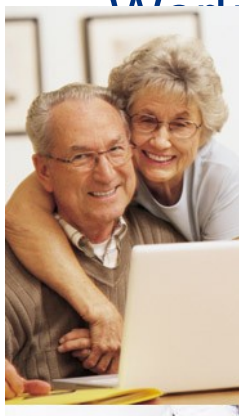


# BAIZE *Financial Concepts*

Working For Your Financial Goals



# Working for Your Financial Goals



Baize Financial Concepts provides specific and individual financial services to our clients that best suits their needs. Whether your financial affairs are simple or complex, we can help develop an investment strategy that is right for you. We are committed to working with each of our clients and have their best interest at heart.

Our team at Baize Financial Concepts offers comprehensive, objective investment guidance to individuals and businesses by assessing our client's needs and preparing an investment plan accordingly. It is our intent to help our clients work toward their most important financial goals, along with their well-being. We are here to serve you.

## Are you prepared For retirement?

Are you getting close to retirement but still wonder how to finance it? Maybe you are retired and wonder if you can stay retired. Let's face it; there are many important financial decisions to make when it comes to leaving the workforce and entering retirement.

Which pension option should I choose?  
What do I do with my 401(k) or 403 (b)?  
Should I keep my life insurance?  
Should I buy long-term care insurance?  
How do I withdraw money from IRAs and make them last?



## The Process

**First meeting** is complimentary to learn more about each other and discuss your priorities, goals, and expectations.

**Second meeting** to review your personalized Financial Plan for a flat fee.

**Third meeting** to discuss specific recommendations and begin implementing strategies.

**Review meeting**, at least annually, to monitor progress and update your plan.

You can call (765) 288-3830 today to schedule your complimentary initial visit with us at Baize Financial Concepts.



# Meet Our Team



**Eric Baize**  
eric@baizefinancial.com

Eric is a lifelong resident of the Muncie area. He graduated from Muncie Southside High School and then from Ball State University, where he earned a Bachelor's Degree with an emphasis on Corporate Finance and Financial Institutions.

Eric has worked in the Securities Industry since 1999 and enjoys helping clients plan their financial futures. Eric holds his Series 7 and Series 63 Securities License, as well as his Investment Advisor Representative registration with Royal Alliance. In addition, Eric is a licensed Life Insurance, Health Insurance, and Long Term Care Insurance Agent.

Eric is a devoted family man and loves spending time with his wife, Laura, whom he has been married to since 1998, and his children, Joshua, Brennan, and Brittany. His hobbies coincide with time spent with the family. Summer weekends are often spent at the lakes with his family skiing, riding the wave runner and fishing.



**Matt Anderson**  
matt@baizefinancial.com

Matt is a devoted family man and loves people. As a lifelong resident of the Muncie area, Matt earned a Bachelor's Degree in Finance from Ball State University.

Matt has owned, various businesses, including Skyline Chili, AM Construction, and Yats. He currently owns the Dairy Queen locations in Muncie, Indiana. Matt has a thorough understanding of finances, business, and strategies of success.

Matt has a sincere care for clients and enjoys assisting clients achieve their own success. Matt holds a Series 7 and Series 66 license, as well as his Investment Advisor Representative registration with Royal Alliance. Additionally, Matt is a licensed Life and Health Insurance Agent.

Matt was married, to wife Traci, in 1991. They have three children, Christian, Cameron and Conner. The family enjoys vacationing, sports, adventures, and simply spending time together.



**Erika Ware**  
erika@baizefinancial.com

Erika is a lifelong resident of the Muncie area. She graduated from Yorktown High School in 2000. She then graduated from Ball State University, where she earned a Bachelor's and Master's degree in Business Education. She spent the next 11 years in public education as a high school business teacher. She decided to make a change in career paths and joined the Baize Financial Concepts team in August of 2016 as the Office Manager.

Erika was married, to husband Bart, in 2008. They enjoy spending time together whether it is at home with their dogs, the golf course, or on vacation. Erika's hobbies include vacationing with her mother, spending time with her dogs, shopping, working on jigsaw puzzles, and doing Sudoku puzzles.



# Products & Services

At Baize Financial Concepts, we provide assistance in the following areas:

## Investments



- Bonds
- Brokerage Accounts
- Common Stock
- Educational IRA
- Government Securities
- ROTH IRA
- SEP IRA
- Simple IRA

## Financial Planning

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- Traditional IRA
- Treasury Bills
- Treasury Notes
- Variable Annuity
- 403 (b) Planning
- College Funding
- Estate Planning Strategies
- Money Purchasing Plans
- Profit Sharing Plans
- Retirement Plans
- Tax Planning Strategies

## Insurance



- Disability Income Insurance
- Life Insurance
- Long Term Care Insurance
- Medicare Supplement

## Whatever Your Goals, We Can Help You Get There

At Baize Financial Concepts, we help clients to first identify their values and priorities and then to implement appropriate financial strategies to help achieve them. We seek to simplify each of their needs with managing their money, allowing them to devote time to their business, their personal endeavors, and most importantly, their family. Our method begins with listening to their goals, their dreams, their aspirations, and their challenges.

### Our Location:

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Toll-free: 888-288-3830

[www.baizefinancial.com](http://www.baizefinancial.com)

