FOR IMMEDIATE RELEASE:

Charles Schwab New Custodian for Spiritus Investment Management Clients

Petaluma, CA, August 2010 – Mark Zaifman, a Financial Planner and Registered Investment Advisor with Spiritus Financial Planning is now working with Charles Schwab as custodian to deliver the one stop shopping that his clients have wanted for years. Not all financial planners are Registered Investment Advisors, and after seven years of clients asking again and again if he would manage their investments, Mark Zaifman of Spiritus Financial is finally giving them everything they want.

"One of my core beliefs is in empowering people to educate themselves around their own finances. With companies such as Vanguard, which has both excellent customer service and support, anyone can manage their own money with confidence." But the fact that they can manage their own money, doesn't mean they want to. "It finally clicked one day when someone said to me, "would you want to change your own oil in your car? That example really hit home - I realized that just because I could, didn't mean I wanted to. I soon after began offering clients a full service financial planning experience that many had been wishing for."

Zaifman's core service is still comprehensive financial planning with a focus on retirement planning. "The numbers of baby boomers getting ready to retire is huge, nearly 19,000 per month for the next 9 years", said Zaifman. These statistics will keep financial planners and registered investment advisors very busy in the years to come."

Baby boomers preparing for retirement are just one of the big life changes steering them in the direction of seeking financial advice. "Many boomers are at the age where they are receiving inheritances, and for some, for the first time in their lives, they have a substantial amount of money and no clue what to do with it." Now, with Schwab as custodian, Zaifman is happy to offer investment management services. As a fee-only financial planner, Zaifman, works on an hourly or pre-determined fee rather than from commissions which assures his clients that the advice his clients receive is independent, objective and always in their best interest.

About Spiritus Financial Planning
We are a fee-only financial planning firm, offering comprehensive personal financial planning, including retirement planning and investing planning services for individuals and small business owners. We offer complimentary consultations to help you in choosing the best financial planner to fit your individual needs.

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