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Income Strategies for a Secure Future

Providence Financial & Insurance Services

When it comes to overseeing financial assets, there are growers, and there are protectors. Anthony A. Saccaro, ChFC, president of Providence Financial & Insurance Services, Inc., has firmly established himself as a protector.

Realizing the importance of helping clients hold on to what they have, he steers clear of the stock market and its risks. But to Saccaro, minimum risk does not mean minimum growth. Through expert familiarity with alternative conservative investments, Providence Financial has been able to achieve consistent above average returns for its clients.

"Most financial advisors are stock market first, everything else second," says Saccaro. "We're the opposite of that. There is a universe of non-stock market alternatives that can be valuable parts of a growing portfolio. I specialize in these, and I enjoy educating clients about how these products and strategies can fit into their financial future."

Looking at the Whole Picture

In serving clients, Saccaro is as holistic as they come. He examines all aspects of his clients' financial holdings, making thoughtful recommendations in every area, not just the ones

he gets compensated for. For instance, he uses his considerable insurance expertise to determine insurance types and amounts needed, even though he doesn't sell it himself. In partnership with a local law firm, he



FREE FINANCIAL CONSULTATION

Providence Financial offers prospective clients a free one-hour financial consultation to assess their financial health. Anthony A. Saccaro, ChFC, will review portfolios and estate plans, determining possible enhancements and improvements. This is a rare opportunity for individuals to receive a no-obligation second opinion of their finances.

also regularly establishes living trusts for his clients, charging them only his outside costs.

Living out his Christian faith and dedicated to service, Saccaro holds himself to a higher standard. Providence Financial is associated with James Rickard of Stewardship Services Foundation, a nonprofit established to support and educate churches and pastors in personal income tax and family finance. As part of this relationship, Saccaro is involved with financial planning and living trust services for members of various churches throughout California.

Saccaro has never lost a client, a testament to the value he adds and the time he takes to understand every situation and educate each client. "It's taken most of my clients 30-plus years to save for retirement," he says. "So I don't expect to have all the answers after a one-hour meeting. It may take several meetings to get a handle on an effective approach."

That is no problem for Saccaro. "I absolutely love sitting down with people, helping them solve their financial problems and strategizing about their future," he says. "Best of all, I sleep well at night knowing that none of my clients will get hurt if the stock market takes a tumble."



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