

Welcome & Introduction

Grow It. Guard It. Building Wealth and Beating Scammers.

- Presented by: Bill DeMarco & Al Feronti, CLU
- Organization: AMFG Wealth Management LLC
- Who we are and what we do
- Why this session matters today
- What you'll take away: clarity, confidence, and caution



Today's Financial Reality

Market ups & downs, inflation, and interest rate shifts

- Rise in cybercrime and financial fraud

- Financial literacy = financial security



Grow It — Build with Purpose

Define your goals: short-, mid-, long-term

- Know your risk tolerance and timeline

- Compounding: small steps = big results over time



Investment Principles that Work

Diversification = financial safety net

- Dollar-cost averaging in volatile markets
- Use tax-advantaged accounts (403(b), Roth IRA, HSA)
- Review and rebalance regularly

Tailored Strategies for You

Match your plan
to your life goals

- Asset allocation
by age, stage, and
income needs

- Why working
with a fiduciary
matters

Guard It — Protect What You've Built

Understand
financial risks:
market, longevity,
fraud

- Have the right insurance in place

- Emergency fund = first line of defense

The Scam Epidemic

- 1 in 5 Americans targeted annually
- Common scams: IRS calls, Social Security fraud, fake investments
- Real stories of real people caught off guard



Advisory Services offered through AMFG Wealth Management LLC,
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Spotting and Avoiding Scams



Pause before sharing sensitive info



- Watch for urgency, fear tactics, and emotional manipulation



- Use strong passwords & 2FA



- Rely on credible sources and certified advisors

Simple Cybersecurity Steps



**USE PASSWORD
MANAGERS**



**• NEVER USE PUBLIC
WI-FI FOR BANKING**



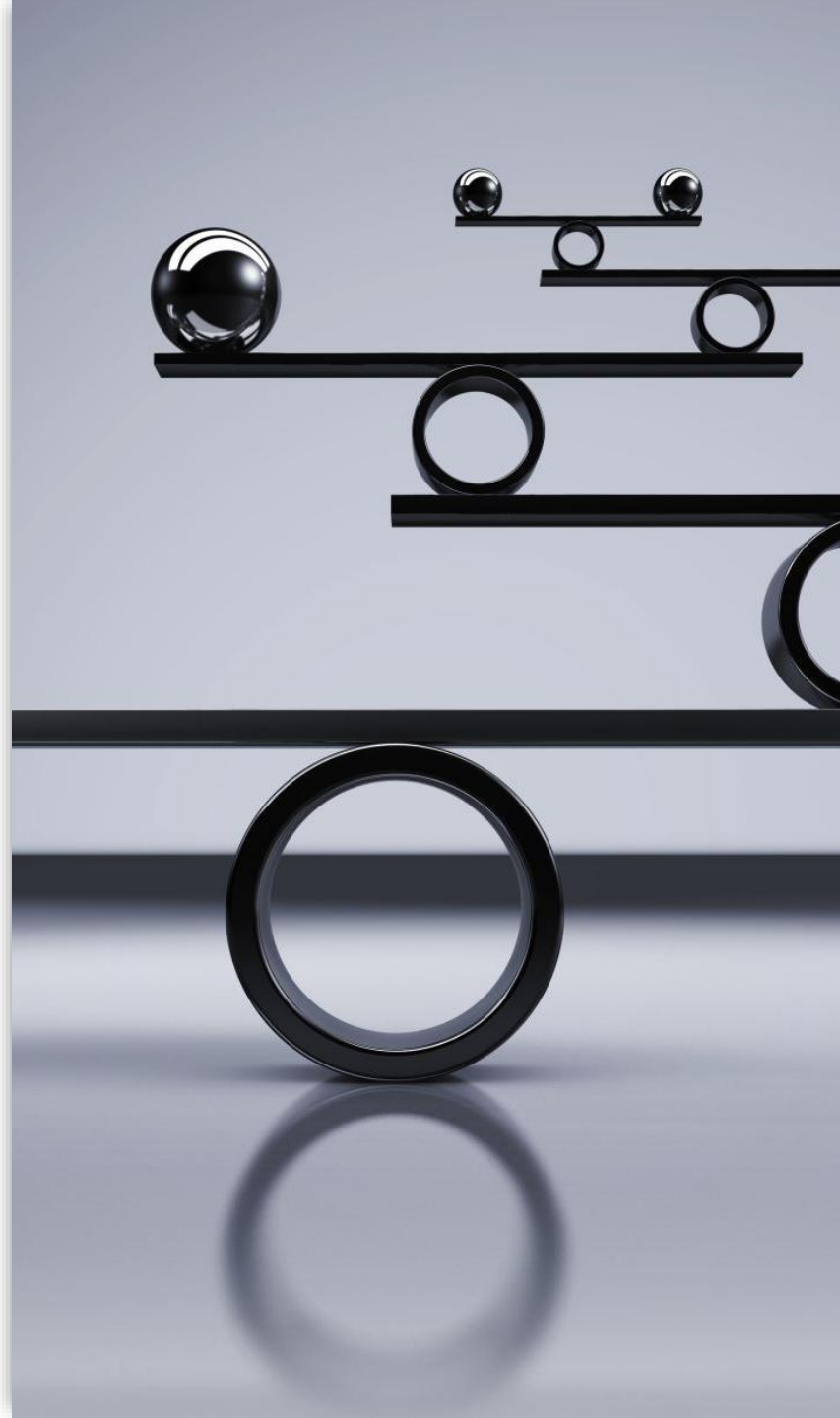
**• KEEP DEVICES &
ANTIVIRUS UP TO DATE**

Balance Growth with Protection

- Growth strategies with downside protection
- Risk tolerance = emotional and financial readiness
- Regular financial checkups are key



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Stories from the Field



Success stories: smart investors, safe savers



- Mistakes to avoid (and how we help clients bounce back)



- Quick tips you can use right now

Final Thoughts & Resources

- Stay informed. Be consistent. Question everything too good to be true.
- Trusted tools:
 - - annualcreditreport.com
 - - identitytheft.gov
- Talk with a fiduciary before making big moves



Q&A + Contact Info




Let's Talk. We're
Here to Help.



Open floor for
questions




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