



# Blue Bell

## PRIVATE WEALTH MANAGEMENT

(<https://bluebellpwm.com/>)

**OUR FIRM**(<https://bluebellpwm.com/insight/>)



**INSIGHT** (<https://bluebellpwm.com/insight/>)

**THE PROCESS**

**CONTACT US**(<https://bluebellpwm.com/contact/>)

**SPEAK TO AN ADVISOR**

([https://bluebellpwm.com/our-  
firm/our-team/alex-larosa/](https://bluebellpwm.com/our-firm/our-team/alex-larosa/))

BLUE BELL PRIVATE WEALTH MANAGEMENT

## Innovative Investment Strategies

A risk management approach using hedging techniques and attempting to uncover hidden value.

**Now that you have changed jobs, what do you do with your old 401(k)?**

[CLICK HERE \(HTTPS://BLUEBELLPWM.COM/NOW-THAT-YOU-HAVE-CHANGED-JOBS/\)](https://bluebellpwm.com/now-that-you-have-changed-jobs/)

MAXIMIZE YOUR SOCIAL SECURITY BENEFITS

## Let us help you maximize your Social Security benefits

**VISIT** [bluebellpwm.com/ssi](https://bluebellpwm.com/ssi)

**1** **Fill out form**  
SOCIAL SECURITY INTAKE

**2** **Review your custom strategy**  
DATA ANALYSIS CREATED  
PDF EMAILED WITHIN 24 HOURS

**3** **Understand how to maximize your benefits**  
TRUST YOUR ADVISOR

**Your Advisor**  
WILL SHARE A CALENDAR INVITE

[www.bluebellpwm.com/SSI](https://www.bluebellpwm.com/SSI)

With the disappearance of pensions and longer life expectancy, Social Security benefits have become an increasingly important part of retirement planning. If you have access to your Social Security statements we can help you optimize this income stream.

[CLICK HERE \(HTTPS://BLUEBELLPWM.COM/SSI/\)](https://bluebellpwm.com/SSI/)

**Have you read our latest wealth management insights?**

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5 reasons why people outlive their money in retirement  
(<https://bluebellpwm.com/5-reasons-why-people-outlive-their-money-in-retirement/>)

**READ MORE ([HTTPS://BLUEBELLPWM.COM/5-REASONS-WHY-PEOPLE-OUTLIVE-THEIR-MONEY-IN-RETIREMENT/](https://bluebellpwm.com/5-reasons-why-people-outlive-their-money-in-retirement/))**

401(K)

There Is No “Magic Bullet” (<https://bluebellpwm.com/there-is-no-magic-bullet/>)

**READ MORE ([HTTPS://BLUEBELLPWM.COM/THERE-IS-NO-MAGIC-BULLET/](https://bluebellpwm.com/there-is-no-magic-bullet/))**

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**READ MORE ([HTTPS://BLUEBELLPWM.COM/NOW-THAT-YOU-HAVE-CHANGED-JOBS/](https://bluebellpwm.com/now-that-you-have-changed-jobs/))**

MARKET UPDATE

What does history say when they sell in May? (<https://bluebellpwm.com/what-does-history-say-when-they-sell-in-may/>)

**READ MORE ([HTTPS://BLUEBELLPWM.COM/WHAT-DOES-HISTORY-SAY-WHEN-THEY-SELL-IN-MAY/](https://bluebellpwm.com/what-does-history-say-when-they-sell-in-may/))**

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Market Sell-off all about Chinese Tariffs (<https://bluebellpwm.com/market-sell-off-all-about-chinese-tariffs/>)

**READ MORE ([HTTPS://BLUEBELLPWM.COM/MARKET-SELL-OFF-ALL-ABOUT-CHINESE-TARIFFS/](https://bluebellpwm.com/market-sell-off-all-about-chinese-tariffs/))**

The Six Principles for Long Term Investing (<https://bluebellpwm.com/the-six-principles-for-long-term-investing/>)

Why Blue Bell Private Wealth Management?



### **Authentic Fiduciary Duty**

We have a legal obligation to act in your best interests.



### **Innovative Investment Strategies**

A risk management approach using hedging techniques and attempting to uncover hidden value.



### **True Fee-Only Advisors**

Our income is derived solely from our clients, our loyalty is to our clients not a large bank.

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## WE STAND FIRM ON OUR PROMISE

Our goal is to permanently improve every client's financial position, simplify their lives and achieve reliable investment results.

[LEARN MORE \(HTTPS://BLUEBELLPWM.COM/OUR-FIRM/WHY-BLUE-BELL/\)](https://bluebellpwm.com/our-firm/why-blue-bell/)

## OUR COMMUNITY OUTREACH PROGRAMS



## Consider Gifting to Charity

If you itemize your deductions the IRS allows you to deduct up to 50% of your adjusted gross income to any donations made to a qualifying charity. However, with the standard deduction doubling many people will

lose the ability to itemize. If you no longer itemize but still wish to donate to charity, please contact us to hear about alternatives.

**Don't have a charity in mind?**

Check out our great partners.

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



## **Review your plan and Portfolio**

It is important to review your portfolio and accounts frequently. Having a plan is important, however we believe the execution of the plan is just as important. Otherwise it can quickly become a useless packet of paper. Please reach out to us if you would like to discuss any of these areas further.

**This is where we can help, Call your Investment Specialist TODAY.**

We look forward to your call.

**610-825-3540**





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Map and Directions (<https://www.google.com/maps?q=Blue+Bell+Executive+Campus+470+Norristown+Road,+Suite+305+Blue+Bell,+PA+19422>)

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