



**PATRICK RUSH**

# DON'T LEAVE YOUR RETIREMENT TO CHANCE

## *Gain Big and Give Back: Financial Planning with Intention (ForbesBooks 2020)*

Many investors are either unconfident or misinformed when it comes to their finances. Untold fortunes are spent by countless Americans hoping to not be left behind in their own future. However, the best wealth-building plan eschews pop, flash, and gimmickry in favor of simple, time-tested methods: sticking patiently to a well-devised financial plan; buying and holding dependable, low-cost, high-value assets for the long run; taking advantage of underutilized tax benefits; and optimizing your options for health care and charitable giving in retirement. It isn't magic. It just works.

*Gain Big and Give Back* is a comprehensive guide with advice focused on pre-retirees and retirees. Yet, regardless of context, Patrick Rush's planning framework and accompanying concepts serve as a functional tool for anyone hoping to make the best moves with their money.

As we approach the greatest wealth transfer in history, it is important to remember how Baby Boomers were able to accrue this affluence—by following simple, age-old, established rules for saving and investing. In *Gain Big and Give Back*, Patrick Rush, who worked in all facets of the financial services industry before launching his own independent wealth management firm, shares his playbook for becoming wealthy and using that wealth to live with purpose.

Starting with developing and adhering to a comprehensive plan, Rush navigates the complex family dynamics surrounding money and makes a compelling case for evidence-based investing that emphasizes long-term gains over short-term speculation by letting the markets work for you.



*In my work as a financial advisor and planner, I've seen people grow great fortunes just by following a remarkably simple system, saving and investing wisely, and planning ahead.*

Money is a means to an end. It can help us avoid the pain that poverty brings, but it should not be confused with happiness. Owing to his humility and steadfast humanity, *Gain Big and Give Back* puts people first and finance second. *Gain Big and Give Back* will empower you to achieve your financial goals but never at your own expense..

Build a foundation worthy of your future; pick up your copy of *Gain Big and Give Back: Financial Planning with Intention* today.



**PATRICK RUSH** is the CEO of Triad Financial Advisors in Greensboro, NC, and a practicing CERTIFIED FINANCIAL PLANNER™. He has received national recognition as a top financial advisor by Forbes, Barron's and the Financial Times, and his firm was awarded by the Invest in Others Charitable Foundation as a "Charitable Champion."

He is the author and instructor of Retirement 101, a course designed to teach the fundamentals of financial planning and investment management to both pre-retirees and retirees.



Rush's great skill lies in his ability to articulate a financial strategy guided by values. Focus on what is important. Define the kind of life you want to live and how you want to give back. Financial goals and investment strategies follow. Clients working with Patrick Rush and his colleagues at Triad Financial Advisors are fortunate indeed.

—Dr. Linda Brady, Chancellor Emerita University of North Carolina Greensboro

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