

IAS BENEFITS & SERVICES

Your membership provides full access to our hotline network and personalized financial services.

✓ Expert Financial Advice (Phone)

Our consultants are salaried professionals (not salespeople) trained in every area of personal finance, and are qualified to answer your questions and help you make important decisions.

Business Hours: Mon – Fri / 9 AM – 5 PM EST

✓ *Success InSight* Magazine

Features articles from various areas of our expertise, including financial tips, economic analysis, tax news, recommended mutual funds and answers to commonly asked financial questions.

Mailed quarterly; can also be accessed online

✓ Extensive 2-year Tax Review

Our experts will review your last two tax returns to uncover possible missed deductions, and provide you with a comprehensive plan for your current tax situation.

Call our Tax Hotline

✓ Investment Portfolio Review

This detailed review includes an analysis of your portfolio by a licensed senior manager, along with answers to all of your questions regarding your specific retirement goals.

Call our Stock & Mutual Fund Hotline

✓ Debt Reduction Help

Using our exclusive Debt & Credit Tracking form, our consultants will design a plan specifically for you and provide one-on-one advice to help get you out of debt quickly and painlessly.

Call our Financial Hotline

✓ Small Business Start-up Resources

We offer instructions and advice regarding important aspects of starting, running, and growing a business successfully. Also learn how to secure business loans and when it's time to sell.

Call our Financial Hotline

✓ Life Insurance

One-stop comparison shopping for competitive rates on low-cost term life and disability insurance by companies rated "A" to "A++" by A.M. Best. Get the right insurance at the right price.

Call our Life Insurance Hotline

✓ College-Funding Advice

Our consultants will help you decipher the array of different college funding tools including 529 plans, Education Savings Accounts, UGMAs, Hope, and Lifetime Learning Credits.

Call our Financial Hotline

✓ *IAS Tax Organizer*

Print (or have mailed) our yearly tax organizer, designed to maximize your deductions and savings. Along with our free tax prep, tax season woes are now a burden of the past!

View & Print Online in Members Area (iasfinancial.com)

✓ Expert Financial Advice (Email)

As part of our provided financial consultation services, members can e-mail our consultants anytime from anywhere to receive unbiased answers to all financial questions and inquiries.

Use our online Contact Form, or email ias@iasfinancial.com

✓ Online Members Area

Access every article we have published over the past 5+ years, along with our monthly recommended mutual funds, financial guides and strategies, calculators and other useful content.

Username and password located on back of SI Magazine

✓ Form 1040 Tax Prep (\$50 Value – FREE!)

Based on proven tax-reducing strategies, our experts will complete your Form 1040 at no cost, and perform additional schedules and state income tax returns at competitive rates.

Call our Tax Hotline

✓ The Best Retirement Plan

From Roth IRAs, 401(k)s, and 403(b)s, to SEP, Keoghs, and SIMPLE plans, our consultants will help you sift through all the choices and decide what is best for your specific needs.

Call our Stock & Mutual Fund Hotline

✓ Credit Management Help

In conjunction with your debt reduction plan, our consultants will help you implement our proven strategies for repairing and strengthening your credit rating.

Call our Financial Hotline

✓ Car-Buying Made Cheaper

Save up to 60% on your next car! We let you know what the car is really worth to ensure you don't overpay. In addition, we uncover dealer "add-ons" and finance gimmicks to watch out for.

Call our Financial Hotline

✓ Auto & Property Insurance

Comparison shopping for competitive rates in most states on automobile, homeowner's, business liability, medical insurance, and umbrella policies. (*Ask for Craig Novak*)

Call our Auto & Property Insurance Hotline

✓ Sample Real Estate Forms

View and print over 40 different real estate forms in our online members area. List of forms includes deeds, warranties, notices, checklists, receipts and more. All are editable in MS Word.

View & Print Online in Members Area (iasfinancial.com)

✓ *IAS Financial Planner*

Print (or have mailed) our guide to preparing a successful financial plan of action. Set yourself on the right path with these important tips, strategies, worksheets, and checklists.

View & Print Online in Members Area (iasfinancial.com)