

# Notes

## Spring & Summer 2009



### **New Newsletter - The Specialist**

The Masters Group is hoping you enjoy our new newsletter, The Specialist. This is designed to keep you up-to-date on investment issues and tax law changes that may have a powerful impact on your portfolio. Being a member of Ed Slott's IRA Group (see [www.ira-help.com](http://www.ira-help.com) for more information) allows us access to this valuable publication.

If you wish to be removed from our mailing list or would like to send your comments to us regarding The Specialist, please contact Diana at [Diana@mastersgroupinc.com](mailto:Diana@mastersgroupinc.com).

### **Doing Business the Right Way**

If you visit VSR's homepage, [www.vsrfinancial.com](http://www.vsrfinancial.com), on a regular basis, you have likely seen VSR - CEO Mike Stanfield's video message to clients. In light of recent unscrupulous and criminal activities by financial advisors (ie. Bernie Madhoff) VSR wants all clients to understand the checks and balances they and their representatives use to insure that these types of ponzi schemes do not occur within our operations.

If you have not seen this video message, The Masters Group encourages you to take a few moments to view it, and call our offices at with any questions. We want you to be secure in the knowledge that when you invest your money with us, it is being handled properly with complete transparency of process.

### **Roth Conversion - 2010 Income Limits Suspension**

*The Wall Street Journal recently interviewed Tim Hawkins, President of The Masters Group regarding the benefits of the Roth - 2010 Income Limits Suspension. This article is scheduled for publication sometime in June. If you are not a subscriber to the Wall Street Journal, you will be able to view the article by linking to our website, [www.mastersgroupinc.com](http://www.mastersgroupinc.com) and clicking on the Wall Street Journal button on the left menu. Please feel free to call the The Masters Group office with any of your Roth Conversion questions.*

### **Continuing Professional Education for CPA's**

The Masters Group will once again be providing continuing education courses for CPA's on June 18 in West Des Moines and June 19th in Ames. The Masters Group is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. Please contact our offices for more information.

**Statement Linking:** Tired of getting several separate envelopes every month from VSR for each & every brokerage account? The Masters Group can request that all your statements be mailed in one envelope from VSR for your household's accounts. Please contact Kristen at our office to set this up.

**Securities & Advisory Services offered through VSR Financial Services Inc., a Registered Investment Adviser and Member FINRA/SIPC.**

**The Masters Group is independent of VSR.**

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