

# THE RESOURCE GROUP



John Marshall and Ron Verkennis, financial planning professionals at The Resource Group/Lincoln Financial Advisors Corp, offer their insight to many elite media outlets.

## CNBC “Power Lunch”

John Marshall discusses the benefits of annuities, calling them a powerful retirement tool.

-John Marshall  
January 2, 2009

CRN 200812-2024529

“The market is like a crying colicky baby, and it would be nice to see it go through childhood and get to the point where it was at least being an impressionable teenager.”

-Ron Adair Verkennis  
“*Four at Four: What just happened*”  
October 29, 2008

CRN 200903-2028178

## The Wall Street Journal

## Bloomberg Television

Ron Adair Verkennis discusses the worries the current market activity is bringing to advisers and investors. Verkennis shares that most of his clients have a mandate: first protect my capital; second grow my capital.

-Ron Adair Verkennis  
October 9, 2008

## Pasadena Magazine

"Clients who want to keep their assets that are less income producing than before, but don't want their children to be taxed on them, need to start moving their assets into living trusts as early as possible. Time is the nemesis of good estate planning."

-John Marshall  
"Frankly Finance"  
December 2008 Issue

CRN 200902-2026465

Ron Adair Verkennis discusses his take on the financial meltdown and offers insight on current market activity.

-Ron Adair Verkennis  
October 21, 2008

## Los Angeles CBS Radio - KFWB

## Glendale News-Press

"It's (bailout plan) only positive in that it frees up lending between banks and therefore gives small-business owners more access to credit. That's pretty critical for small business. To unblock the gridlock is going to be a positive thing."

-John Marshall  
"Leaders divided on bailout"  
October 3, 2008

CRN 200903-2028197

"When Treasuries are yielding two-and-change [slightly above 2%], other forms of debt look overvalued."

-Ron Adair Verkennis  
"Muni bonds get ahead of themselves"  
February 12, 2009

CRN 200902-2026467

## BusinessWeek

## Denver Post

"Our natural response is to save our money and not spend. We sit on our wallets."

-John Marshall  
"A worried outlook might make money matters worse"  
December 21, 2008

CRN 200903-2028188

John Marshall suggests that a small business owner should consider repositioning their shares outside of their estate to "the other side of the tax fence," if their business is feeling the affects of the downturn in the economy.

## Financial Times

-John Marshall  
"Gain benefits by giving away battered assets"  
November 11, 2008

CRN 200902-2026467

## BusinessWeek

"It's easy to invoice, easy to do the books, and easy to control just one relationship. But if you have a client that has a controlling position over your business and that client experiences some hard times, you'll really be suffering."

-Ron Adair Verkennis  
"How small business owners can cope with the crisis"  
October 10, 2008

CRN 200903-2028192

"Rebalancing makes you buy low and sell high, with the added benefit that you're not throwing any more money in than what's already there. Historically, the best time to buy into the market has been when everyone is afraid."

-John Marshall  
February 2009 Issue

CRN 2009-2024920

## Men's Health

## Mainstreet.com

"Look for the financial strength of the insurance company. What you're looking to know: What kind of financial reserves do they have? What surplus do they have?"

-Ron Adair Verkennis

"AIG Alert: What are the rights of an insured individual"  
September 18, 2008

CRN 200903-2028185

## Burbank Leader

"It's (bailout plan) only positive in that it frees up lending between banks and therefore gives small-business owners more access to credit. That's pretty critical for small business. To unblock the gridlock is going to be a positive thing."

-John Marshall

"Leaders divided on bailout"  
October 3, 2008

CRN 200903-2028183

## The Washington Post

"Why not utilize a term life insurance policy that drops along with her mortgage obligation over the years? With this custom approach, her premium would be less, leaving more dollars in her hands to invest."

-John Marshall

"Customizing policies can cut down on insurance costs"  
March 1, 2009

CRN 200903-2032006

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