

A Friendly Encounter
With a few Exotic
Animals



Taxable, Tax-Deferred
or Tax-free?

P2



Travel, Speaking
Offers and
More

P2

Yes, That is a Large Snake Around My Neck...



...And the Look on Simon's
Face as He Watches
Me....Priceless.



Interest & Dividends

By David Hedges, CWS

...But It WAS Interesting Letting Him Hang Around My Neck!

The snake you see pictured above is actually an albino Burmese python. It weighs in at 65 lbs and eats financial advisors for dinner....just kidding!

The Burmese python can and has grown to lengths of 18 feet and can be a voracious eater. You wouldn't want to confront or touch one of these reptiles unsupervised or in the wild.

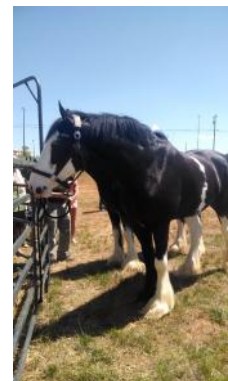
Several weeks ago, we stopped by an open house for a new commercial and residential development that is located just off of exit 31 on I-77 by the name of Langtree and there were a number of festivities that were in progress. One of those was an exotic petting zoo

that was put on by an organization by the name of Zootastic. They're an animal park located on the east side of I-77 in Troutman, NC.



I've never been to the actual Zootastic Park since the animals that we saw were transported from the Park to Langtree. I have had others tell me that it is a lot of fun and a great experience so we'll likely go there soon.

If you get the chance or are looking for something to do, Zootastic would likely be a lot of fun.



A local horse farm brought a few Clydesdales to pull a wagon around for rides. What a beautiful animal!

Enjoy this issue of Interest & Dividends!



I have mixed feelings about animals in captivity but after I learned a little more about their organization and their exotic animal rescue program (they accept abused or neglected animals), I felt pretty good about visiting with the little creatures :).

There were a variety of animals there that day including a kangaroo, which was pretty neat.

- David

Taxable, Tax-Deferred or Tax-Free?

I do a fair share of reading that is industry specific as well as more general material that has to do with self improvement as well as business development, management and ownership.

The material that I read that specifically has to do with the benefits of taxable, tax-deferred or tax-free investments and then goes on to make a personal recommendation to the reader is always good for a chuckle. There's no possible way that the author of the material can know anything about your personal financial circumstance and what it looks like either now or in the future. Most of us have a diffi-



cult time figuring out exactly what it's going to look like ourselves!

Having said that, there are a number of different types of IRAs, tax-free bonds, insurance contracts, etc. that are tax advantaged. Without taking a close look at what the financial picture is of the individual that may be a candidate for any of these, it's really just guesswork.

Does a Roth IRA provide tax-free growth? Sure it does. Should "Mary" or "Bob" contribute to one? I don't know. Maybe. A better question may be "Can they?" Maybe they make too much money to be able to qualify for a Roth IRA.

See what I mean about blanket recommendations made via media?

My point being, your situation is unique and therefore your solutions should be unique. Be careful of putting too much credence in the advice that you read, watch or listen too from public sources. There's a lot of noise out there and sometimes I even find myself mesmerized by the information.

What's your best bet? Seek some professional advice. You and your money deserve it :).



I'm Booking Speaking Engagements Again

I've been on a fairly long hiatus from speaking engagements and I'm just now getting back in the groove. In the past, I've spoken to associations, corporations, clubs, churches, etc., etc.

If you or someone that you know is interested in me coming to speak on specific material, please call or email me and we can talk about the variety of material that I am proficient at speaking about.

No promises, but I have been known to spring for breakfast, lunch or dinner for the group that I am speaking to!

What You May Not Have Known About Me

I can fly a plane. Yes, it's been a while. Yes, if you're flying with me you will likely live. No, the landing will not be smooth as silk.

Because of a few of life's interruptions, I don't have a pilot's license. But, I do have 20+ hours of flying under my belt from years ago and if I *had* to take off and I *had* to land, I could get them both done without any permanent injury to anyone :).



What you see above is a house on the side of the mountain in Gatlinburg, TN that was built as an exact replica as the Barbie house. I took this picture from the tram as we went up to the top of the mountain. In the past, it was painted hot pink. I wish that it still was :).



If you've ever been to Gatlinburg, you'll recognize the above as the city of Gatlinburg. It really is a fun place to visit for everyone. Did I mention the 4 places that they make and that you can sample moonshine?.....



Need to reach me?

126 S. Main Street, Suite 2c
Davidson, NC 28036

Tel 704.256.6016
Fax 704.256.6017

david@bookmanbright.com