



Retirees Fired by Their Brokers in America

What to do if your American brokerage firm told you that you need to transfer your account to another firm

**** Is your account affected? ****

If you have been asked to move your money out of your brokerage firm, rest assured you that you aren't alone. In fact, I recently posted an article on my blog (Profile-Financial.com/jp) telling how one of Wall Street's top firms has closed down client accounts in over fifty countries.

**** Find a cross-border friendly firm ****

There is a special type of cross-border investment company that is both a U.S. brokerage firm and accepts non-resident clients. International investment companies, such as Profile Investment Services, Ltd., are able to set up U.S. investment (brokerage) and retirement accounts for clients who live outside the United States. As advisors licensed in multiple jurisdictions, including the U.S. and Israel, we can provide investment advice as well as custody and clearing of accounts. Profile has over 25 years' experience in helping dual citizens manage their retirement accounts, receive inheritances, and buy appropriate investments (stocks, bonds, mutual funds, ETFs, CDs, etc.).

**** Review your portfolio now ****

In my recent webinar about creating a financially successful retirement, I reviewed how to properly design your portfolio to generate income and growth. If you missed the program, send me an email and I'll send you a replay link (doug@profile-financial.com)

If you've received a "Dear John" letter telling you to move your investment account elsewhere, or even if you haven't, but feel that you would benefit from a cross-border, licensed financial advisor review of your retirement portfolio, call (02) 624-2788.

Wherever you are on the path to retirement, *The Goldstein on Gelt Show* helps you manage your money better. Download our latest episode to

- understand the basics of personal finance (budget better, save more, avoid debt),
- learn investment strategies from the world's best investors,
- improve your retirement plan, and
- build healthy financial habits.



Every show includes a discussion with an expert on how to invest for success. Host Douglas Goldstein, CFP® uses his 25 years of experience as a financial advisor to make money concepts simple to understand. Practical lessons give you tools and tips so you can make real changes. Contact Doug at Doug@Profile-Financial.com or call +972-2-624-2788.

Due to the unpredictable nature of the investment markets, the ever-changing economic scene, and the inherent risk that an investor may lose money, there is no guarantee or assurance whatsoever that any of the ideas or strategies discussed here will be successful. We are not responsible for any loss, liability, or risk incurred as a result of applying or using any of the information on this show. Please read the complete disclaimer [here](#).

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