



OAKTREE
PREMIUM FINANCE

FINANCIAL NEWSLETTER

August 2023

**Unlock Your
Financial Superpowers:**
*Unleashing the Magic
of Financial Leverage*



OAKTREE
PREMIUM FINANCE

Seminar:

Retirement Investment Returns: Navigating the Complexities for a Secure Future

Thursday
Aug 15th
3:15pm

≡ Limited ≡
Seating

Alphagraphics Layton conference room

2555 N HILL FIELD ROAD, LAYTON, UTAH 84041

RSVP 385-393-4775

Financial New\$letter

August 2023,



**Unlock Your Financial Superpowers:
Unleashing the Magic of Financial Leverage**

Financial leverage holds the key to your path toward financial success. Remember when you purchased your home, utilizing a down payment and leveraging it as collateral for a loan? That was the power of leverage in action. Inspired by Archimedes' famous quote, "Give me a lever long enough and a fulcrum on which to place it, and I shall move the world," financial leverage has the extraordinary ability to accelerate growth, unlock new opportunities, and bring your financial aspirations to fruition.

Leverage serves as a strategic tool that empowers you to transcend your existing limitations and achieve extraordinary results that surpass your individual capabilities. It grants you access to additional capital, advanced technology, expansive networks, profound knowledge, and intelligent systems that go beyond what you possess personally.

By mastering the art of leverage, you can:

1. **Propel the speed of your financial achievements.**
2. **Multiply your wealth manifold.**
3. **Enhance your overall lifestyle by freeing up your time from mundane tasks.**
4. **Enable yourself to focus your energy on pursuits that bring fulfillment and excellence.**

Pietros Maneos once remarked, "If compound interest is indeed the 8th wonder of the world, then leveraged compounding is certainly the 9th, 10th, and 11th."

Echoing this sentiment, Grant Cardone expressed, "Rich people use debt to leverage investments and grow cash flows. Poor people use debt to buy things that make rich people richer."

One unique feature of Kai-Zen is its three-to-one leverage, which requires no credit checks, loan documents, interest payments, or personal guarantees. By providing a down payment that funds a cash-accumulating life insurance policy and assigning it to the lender as collateral, you can receive up to three times more funding for your policy. This policy, as expected, offers death benefit protection and living benefits riders that provide cash in case of chronic or terminal illness. The surplus funds are credited to your policy, partially based on changes in stock market indexes like the S&P 500, all while safeguarding your policy from the risks of market downturns.

As Robert Kiyosaki aptly stated, "Financial leverage is the advantage the rich have over the poor and middle class."

And Richie Norton emphasizes, "Attempting to succeed without embracing the tools immediately available for your success [like leverage] is no less absurd than trying to row a boat by using only your hands or trying to unscrew a screw with nothing more than your fingernail."

We firmly believe that achieving wealth necessitates harnessing the power of leverage. If you fail to incorporate leverage into your business and wealth strategies, you essentially sacrifice the velocity, time, and diligent efforts required to reach each milestone of triumph.

-Jim Barlow, MS, CFP

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What is Kai-Zen

Kai-Zen is a strategy that helps you maintain your current lifestyle in the event of a chronic illness, premature death, or an inability to sufficiently save for retirement. Protecting your earnings is critical to insuring your ability to save for retirement. Due to limitations, traditional retirement plans are typically insufficient for high-income earners. If you want to maintain your lifestyle in retirement, you need a proactive strategy that puts more money toward protecting your future income without putting a drain on your current finances.

Kai-Zen is the **ONLY** strategy that uses leverage to help you acquire more of the benefits you need to financially protect you and your family. Its unique fusion of financing and life insurance offers you more protections and the potential to earn more for retirement than you could obtain without leverage.

THE Kai-Zen® STRATEGY

[For More Info](#)



Kai-Zen®

The Next Big Thing.

You Don't Want To Miss

NIW

The banner features a dark blue background with several upward-pointing arrows in various colors (red, light blue, white, yellow). A magnifying glass with a play button icon is positioned over the text. The NIW logo includes a small globe icon.

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Quotes Jim sent his family this past month:

"Ambition is when you expect yourself to close the gap between what you have and what you want. Entitlement is when you expect others to close the gap between what you have and what you want."
James Clear

"In hard times, people don't want to be told to look on the bright side. They want to know you're on their side. Even if you can't help them feel better, you can always help them feel seen. The best way to support others is not to cheer them up. It's to show up." Adam Grant

"Anything that is alive is in a continual state of change and movement, The moment that we rest, thinking that you have attained the level you desire, a part of your mind enters a state of decay. You lose your hard-earned creativity and others begin to sense it. This is a power and intelligence that must be continually renewed, or it will die."
Robert Greene

"If You Do What is Easy Your Life Will Be Hard. But if You Do What is Hard Your Life Will Be Easy."
Les Brown

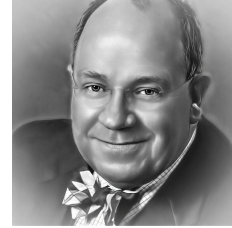
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