



OAKTREE
PREMIUM FINANCE

FINANCIAL NEWSLETTER

July 2023

**Nurturing Empowered
Decision- Making:
*OakTree Premium
Finance's Commitment
to Retirement Income
Planning.***



OAKTREE
PREMIUM FINANCE

We help people discover their retirement income gap and put them on track with less.

Financial New\$letter

July 2023

Nurturing Empowered Decision-Making: OakTree Premium Finance's Commitment to Retirement Income Planning.



Zoe Chance, a respected researcher and professor at the Yale School of Management, has conducted insightful studies on consumer behavior and decision-making. Her research has shed light on the fact that individuals generally prefer to make their own decisions rather than being subjected to persuasive sales tactics.

One of Chance's notable findings revolves around the concept of "self-persuasion." Through her research, she discovered that when people actively engage in decision-making and persuasion, they become more convinced of their own arguments and choices. This process of self-persuasion instills a sense of autonomy and control, leading to greater satisfaction with the decisions made. Chance's studies indicate that traditional methods of sales and persuasion, such as aggressive marketing tactics or high-pressure sales techniques, may not be as effective as giving individuals the opportunity to evaluate information and make decisions on their own terms. By allowing consumers to feel a sense of ownership and control in the decision-making process, companies can increase the likelihood of positive outcomes.

These findings support the notion that people highly value their autonomy and independence when it comes to making choices. They want to actively participate in the decision-making process rather than being coerced or manipulated into a specific option. To provide a more positive and satisfying consumer experience, companies should focus on providing individuals with relevant information, fostering an environment of choice, and respecting their autonomy.

At OakTree Premium Finance, we hold a steadfast belief in the significance of Zoe Chance's research. Our mission is to guide and support our prospects as they explore the transformative concept of Kai-Zen, delving into a comprehensive research to

uncover what we consider to be the most exceptional retirement income strategy presently available. By providing individuals with vital information and bolstering their decision-making process, our aim is to curate a positive and enriching customer experience that spans the entirety of their retirement years.

-Jim Barlow

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](#)



Quotes Jim sent his family this past month:

“Showing kindness causes oxytocin release in the recipient that motivates him or her to be kind to

“Outsized returns often come from betting against conventional wisdom, and conventional wisdom is

others. You can start. This virtuous cycle in the simplest ways, for example, by giving someone a hug, I send you a hug!"

-Paul J Zak

"I hope that either all of us or none of us are judged by the actions of our weakest moments, but rather by the strength, we show when and if we're ever given a second chance"

-Jason Sudeikis as Ted Lasso in 'Ted Lasso'

"The greatest danger in business and life lies not in outright failure but in achieving success without understanding why you were successful in the first place."

-Robert Burgelman

usually right. Given a 10 percent chance of a 100 times payoff, you should take that bet every time. But you're still going to be wrong nine times out of ten . . . We all know that if you swing for the fences, you're going to strike out a lot, but you're also going to hit some home runs. The difference between baseball and business, however, is that baseball has a truncated outcome distribution. When you swing, no matter how well you connect with the ball, the most runs you can get is four. In business, every once in a while, when you step up to the plate, you can score 1,000 runs. This long-tailed distribution of returns is why it's important to be bold. Big winners pay for so many experiments." ---

-Jeff Bezos

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