



INCOME STRATEGIES, LLC

Small Changes. Big Results.

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Since 2006, Rebecca has worked with her clients to put in place strategies and concepts that allow them to move closer to the life they want for themselves and their families. She knows that change is inevitable; in life, business and in finances. Preparing for and navigating those changes determines a person's lifestyle after the storm, and Rebecca is passionate about her clients' preparation.

Growing up in the country, on 18 acres in Central Kansas, provided her with unique experiences that helped shape who she has become. Her father, a small business owner, taught hard work and commitment, and instilled a 'do anything' attitude. She is thankful for being taught these values as each of these qualities is vital to the work that she does today. Because she is familiar with what it takes to start, run and make a living from a small business, a high percentage of her client base is comprised of small business owners. Helping them through the lifecycle of business is critical for their success towards retirement.

Since 2010, Rebecca has qualified as a member of The Million Dollar Round Table® (www.MDRT.org), regarded as the standard of sales excellence for life insurance and financial advisors. She has served on the board of directors for NAIFA, *National Association Insurance & Financial Advisors* since 2007, making her way through the chairs, serving in all three executive positions, most recently as President in 2013. She currently holds the National Committeeperson seat for the Johnson County-Wyandotte County chapter (www.NAIFA.org). In 2012, she was asked by New York Life to join a group of 125 peers selected to be the *Political Involvement Leader* for their respective firms. Serving as the Kansas City *PIL* she met with both the Missouri and Kansas senatorial and congressional representatives, locally and in D.C., advocating on behalf of her clients regarding issues and concerns that will impact their financial future. In 2013, she was asked by the AARP to become one of 5 local *Authorized to Offer* agents for the New York Life branded AARP life, annuity and long-term care products available to AARP members. Rebecca believes in supporting those that have a vision and a dream, which is why she served on the board for ReVolve, a homegrown 501c3 focusing their efforts towards Kansas City's green impact/urban core zone and the rewards of a healthy lifestyle through cycling (www.revolvekc.org).



In 2017, PIVOT Income Strategies was formed, creating a team of associates and enhancing the structure under which Rebecca serves her clients. Why PIVOT? Because making small pivots in your financial strategies can have a dramatic impact on what's ahead. PIVOT Income Strategies helps you make the pivotal changes in your financial, protection and investment strategies to help protect you, your family, your business and create guaranteed income in retirement.

Today, Rebecca has over 2,000 clients across 10 states, with over \$500 Million in Assets Under Care, including Death Benefit Proceeds, Annuities, Mutual Fund Accounts, Long Term Care, and Cash Value of Life Insurance. Rebecca finished 2017 in the top 275 of all ~17,000 NYL advisors nationwide.

As you get to know Rebecca, you'll see, her passion runs deep, in her work, and in her hobbies and interests too. To keep her brain occupied, her free time is filled with cooking, practicing her golf game, and taking her two dogs, Zoni, a Puerto Rican rescue terrier-lab, and Newman, a toy Aussie-Poo, on trips in "Rosie the Revel Van." She loves cooking and learning about anything with wheels and a motor; cars, motorcycles airplanes and more. While attending the University of Kansas, she played for the women's rugby team, which may hold the answers to her questionable development.

How She Helps Her Clients:

- Retirement Planning
- Business Succession / Exit Planning
- Estate Equalization and Trust Funding
- Family Income and Asset Protection Planning
- Extended Health Care Planning Strategies
- Life Insurance & Leverage Concepts
- Social Security Planning
- Corporate Financial Education for Small & Mid-Size Companies
- Group Employee and Employer Benefits
- 401k, SIMPLE, SEP, 403b placement



Insurance Estate Planning
Member, NAIFA
Member, Women in Insurance and Financial Services



Proud to Offer



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