

Oct. 1, 2005

FOR IMMEDIATE RELEASE

BEACHSIDE RETREAT OFFERS NEW APPROACH TO FINANCIAL PLANNING

Planning one's financial security can be a daunting process filled with anxiety. But thanks to places like The Retreat House in Shell Beach, California, the task is not only becoming more pleasant, but relaxing and educational as well. Located just a few steps from the ocean, The Retreat House is a cross between a financial planning center and a bed & breakfast inn, offering a comfortable, relaxing environment for planning and reflection.

Created by author and financial planning expert Judi Martindale, CFP, president of Martindale & Assoc., The Retreat House invites guests to integrate their financial goals with their personal values. Each phase of the financial plan includes exercises to assist clients in clarifying and aligning their actions with their financial and personal wealth objectives. Clients reflect on the work during meal and overnight breaks while walking on the beaching or sitting in front of the fireplace, enjoying the peace and quiet.

“In our hectic world, it's essential to pause and reflect on how we live our lives and spend and invest our money,” said Martindale. “Financial well-being affects nearly every aspect of your life and you need time to consider its impact on the future you want to live. By working with clients in a natural setting, The Retreat House program allows

/ more /



Financial B&B/Add1

guests to relax in a home-like environment and work through their plans at a comfortable pace.”

The two-day program focuses on every aspect of financial and personal wealth, including investments, insurance, retirement, tax and estate planning and goal setting. Each client works directly with Martindale on these areas and then offered time throughout the process to do homework assignments while relaxing in the retreat or the nearby beach. Follow up meetings are scheduled for tax preparation, investment review and ongoing financial concerns.

“Creating a comfortable future is something everyone needs to do,” said Martindale. “The Retreat House simply allows individuals to do it in a home-like setting that gets them away from the hectic pace of everyday life.”

The Retreat House is located in Shell Beach, CA, halfway between Los Angeles and San Francisco.

For more information, visit www.judimartindale.com or call Judi at (805) 773-2400.