

REY CRUZ

INSTRUCTOR | AUTHOR |
TAX PLANNER |
FINANCIAL GURU



CRUZING INTO RETIREMENT

If you're getting ready for retirement and have been listening to retirement experts for tips, then you might want to watch out. Many of those experts are wrong and haven't been giving out the most effective and up-to-date advice on retirement planning.

Rey Cruz offers a more holistic approach. He believes that looking at all of the numbers together – RMD, SS, Pensions, etc. His 9-step "Cruzing into retirement" plan takes this rounded approach and identifies potential opportunities and challenges in retirement tax plans.

As a speaker, Rey impresses upon audiences why they must reassess their retirement plan and take a more holistic approach to preparing for their future.

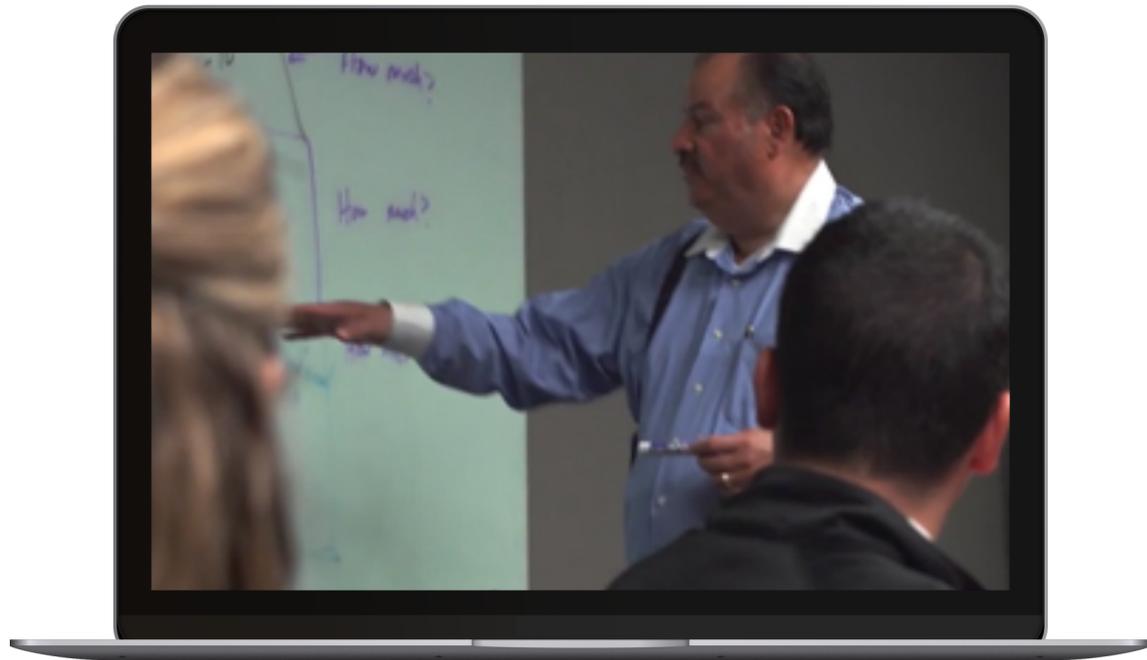
“Everyone has a choice, leave more of your money to Your Uncle Sam in Washington or to your family.” - Rey Cruz

REY CRUZ

OWNER, CFP, CRUZ INVESTMENTS & WEALTH MANAGEMENT

As an Ed Slott Master Elite Tax Advisor for the past 15 years, Rey Cruz has dedicated himself to helping families plan for the future. In fact, he and his organization have helped over 300 families in Aurora, Illinois. Rey has taken his message beyond his wealth management organization as a financial guru on FM 95.9 The River and an author.

In his free time, Rey spends time with friends and family, including his wife, Monica, and their children, Carissa and Christian. He loves baseball, music, dancing, and the Indy 500.



Speaking Topics

- ▶ TELL ME ABOUT YOUR TAX FREE BUCKET OF MONEY
- ▶ CRUISING INTO RETIREMENT

People Are Talking ABOUT REY

SPEAKER RATING: ★★★★★



"I loved how you made it interactive!"



"You made me think about my plan in a different way & Ive had an advisor for 20 years."



"Im amazed at how much I learned in your 4 hour class. Your class was excellent!"