



WEALTH MANAGEMENT



VIMA 401K NAVIGATOR



VIMA 401k Navigator

The VIMA Advantage

VIMA Wealth Management's investment strategy is focused on protecting portfolios during bear markets while realizing attractive returns during bull markets.

VIMA Wealth Management has expanded their service to also include 401k retirement advisory services for individuals. Many individuals are left to manage their own retirement assets without the advantage of multiple decades of successful investment experience and the education of our outstanding team of professionals to help navigate a secure retirement investment portfolio.

Investment Strategy

The active management of VIMA 401k Navigator is very different than the typical "buy and hold" approach that left many investors scratching their head from the large declines in 2018, 2020 & 2022 and wondering if there is a better way to invest.

Typically, our portfolios include 20% fixed income, which comprises investing in the Money Market, Bonds & the Fixed Income Account.

If your employer offers a self-directed Brokerage Account, we encourage clients to move some of their assets into this for more investment choices.

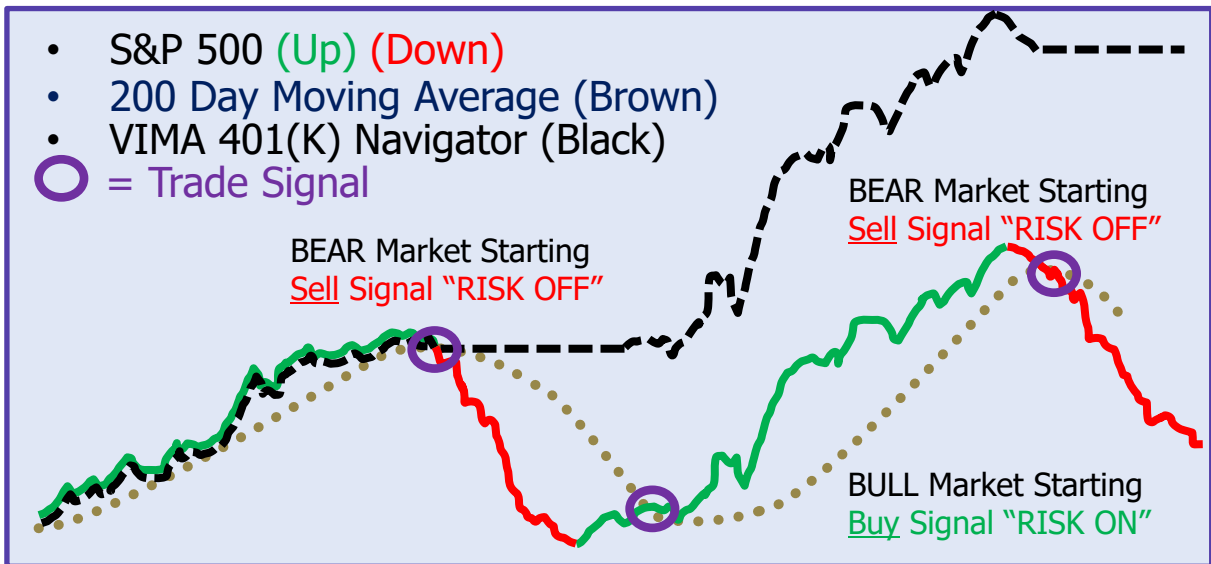
Services Provided

1. Active portfolio management utilizing VIMA's Technical Indicators to adjust to market risk.
2. Quarterly reviews of retirement plans and goals.
3. We will investigate to see if your employer allows after-tax contributions, and/or Roth contributions.



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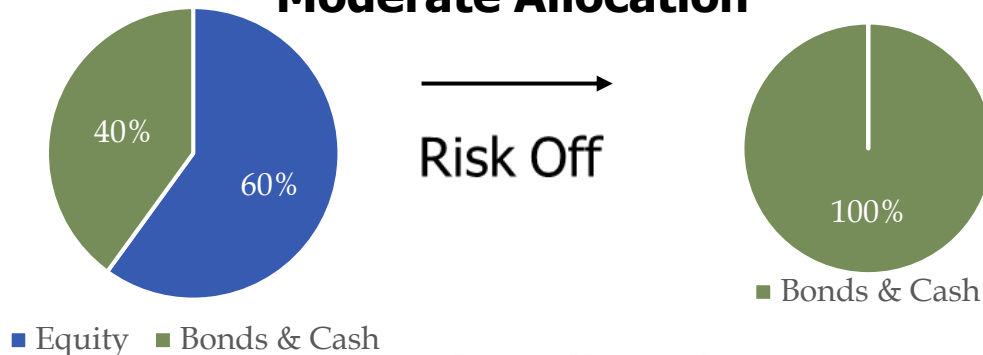
Allocation



Conservative Allocation



Moderate Allocation



Aggressive Allocation





VIMA 401k Navigator

Dennis M Prost, CFP® RF™

VIMA Wealth Management

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Dennis is a Certified Financial Planner™ & Registered Fiduciary. He holds 2 Bachelor of Science degrees from Ferris State College in Health Services Management & Business Administration in 1985 & a Master of Business Administration at Central Michigan University in 1990.

After working in the financial investment field for 32 years, Dennis joined the VIMA team in 2022. Dennis specializes in Retirement Planning, Estate Preservation & Tax-Efficient Investing.

Please feel free to contact Dennis directly via phone or email.

Advisory Services offered through VIMA Registered Investment Advisors.

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