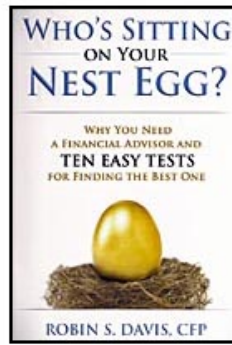


**Baby Boomers are Sitting on \$20 TRILLION in Investments
Why They're Sitting Ducks for Quack Financial Advisors**

Author of "Who's Sitting on Your Nest Egg? Why You Need a Financial Advisor and Ten Easy Tests for Finding the Best One" tells your audience:

- ⌘ How to find a competent financial advisor
- ⌘ How to quickly judge if an advisor is out to rip you off
- ⌘ The biggest money mistakes baby boomers make and how to avoid them
- ⌘ The No.1 Reason You shouldn't do your own investing
- ⌘ The 5 tools to retire confidently
- ⌘ How baby boomers can be better investors
- ⌘ How to stay afloat during the current down market
- ⌘ Trying to recoup your lost savings? What to avoid and who to avoid along the way
- ⌘ Top 5 money mistakes people make
- ⌘ Why seniors are the No.1 target for dishonest financial salesmen
- ⌘ 5 ways to test your current advisor

And much more...



Robin S. Davis, CFP®

**9 out of 10 financial advisors
are salesmen**

Baby boomers are not only the wealthiest generation in American history; they're also most at risk for being defrauded by unscrupulous financial "salesmen".

Robin Davis, a CERTIFIED FINANCIAL PLANNER™ for the past 24 years says, "There's a huge problem with the financial planners in my business. Nine out of ten advisors are really commission- hungry salesmen."

After hearing horror stories from clients who were tricked into unsuitable investments that wiped out their retirement savings, Robin has made it her mission to educate the public on what financial advisors are supposed to do.

Robin has appeared on *Oprah and Friends*, *Marketwatch.com*, and dozens of radio shows. She shares funny and alarming investing stories and gives wise financial advice.

Contact:

P : 772.600.1076

F : 772.463.4446

E- mail :

rdavis@robindaviscfp.com

1805 S Kanner Hwy
Stuart, FL 34994

Web :

www.robindaviscfp.com

Robin S. Davis CFP®



Robin Davis is a CERTIFIED FINANCIAL PLANNER™ leveraging 24 years of experience in the business. She is the owner and top advisor of Davis Wealth Enhancement Group in Stuart, FL. She has been advising retirees and those nearing retirement since 1984, helping her clients work toward their financial goals. A member of the Financial Planning Association®, Davis had held hundreds of public seminars around the country.

Robin is the author of an award winning book titled, “Who’s Sitting on Your Nest Egg? Why You Need a Financial Advisor and Ten Easy Tests for Finding the Best One”, which is endorsed by the Financial Planning Association®. The book reveals the importance of working with a competent, ethical advisor and offers readers 10 easy tests for finding the best financial planner.

She hopes to aid investors in discerning between the “salesmen” in the financial industry- those who have dollar signs in their eyes instead of your best interest in mind-and quality financial planners.

Davis is a contributing author for *Affluent Magazine* and has been a guest on numerous radio shows including *Oprah & Friends*.

She currently resides near West Palm Beach in Stuart, FL., with her husband and two children.

Contact Information

Phone: 772.600.1076

Fax: 772.463.4441

Web: www.robindaviscfp.com

E-mail: rdavis@robindaviscfp.com

Television Appearances



**I-Team Investigation:
Money Mistakes
Monday, May 12, 2008
West Palm Beach, FL**

Robin Davis joins News 12's Tara Cardoso in an I-Team Investigation into the tricky sales tactics of unscrupulous financial advisors.



**Sunday, June 29, 2008
6:15 am & 8:20 am EST
West Palm Beach, FL**

Robin Davis shares savvy tips for staying financially on track during these tough economic times, along with addressing topics from her book *"Who's Sitting on Your Nest Egg? Why You Need a Financial Advisor and Ten Easy Tests for Finding the Best One"*



**Sunday, September 28, 2008
6:30 am & 8:30 am EST**

Robin Davis discusses financial planning in your 20's, 30's, 40's, 50's, & 60's- Where you should be, and what steps you can take to get yourself on track.



Radio Appearances

&OPRAH
FRIENDS



lifestyle
TalkRadio
Network®



"The Donna Seebo Show"

CNN 650
RADIO NEWS

 **The Daily Bear**
radio show



philadelphia's renaissance radio station
WNJC 1360
AM
sports - news - oldies
talk - country

wsRadio.com
the worldwide leader in internet talk

"Up Close & Personal"
w/ Bonnie Graham



KYW-AM News Radio 1060


WELL-PRESERVED™

With Steve Casto


FAMILYNET

Today's Author with David Ewen

"Mornings with Lorri
And Larry"



Print Media

9/25/2008 [Stuart News](#) print: interview
9/01/2008 [Affluent Magazine](#) contributed article
8/01/2008 [Affluent Magazine](#) contributed article
7/25/2008 [Stuart News](#) print: ran Marketwatch column
7/01/2008 [Affluent Magazine](#) contributed article
6/01/2008 [Affluent Magazine](#) contributed article
5/01/2008 [Affluent Magazine](#) contributed article
4/01/2008 [Affluent Magazine](#) contributed article
3/01/2008 [Affluent Magazine](#) contributed article
2/01/2008 [Affluent Magazine](#) contributed article
1/01/2008 [Affluent Magazine](#) contributed article
7/12/2007 [ValleyLife Sacramento CA](#) print: e-interview
7/16/2007 [Sabrina's Reviews](#) Lincoln NE online: book review
7/18/2007 [Marketwatch.com](#) New York NY online: interview
7/18/2007 [Freelancer online](#): interview
7/26/2007 [Jimagnew.net](#) Chicago IL online: book posting
7/26/2007 [Foxnews.com](#) New York NY online: ran Marketwatch column
7/26/2007 [The Morning Call](#) Allentown PA online: ran Marketwatch column
8/14/2007 [The Plain Dealer](#) Cleveland OH print: ran Marketwatch article
8/14/2007 [Fort Worth Star-Telegram](#) Fort Worth TX print: ran Marketwatch article
8/14/2007 [The Bulletin Bend](#) OR print: ran Marketwatch article
8/14/2007 [Poughkeepsie Journal](#) Poughkeepsie NY print: ran Marketwatch article
8/14/2007 [The Gazette](#) Cedar Rapids IA print: ran Marketwatch article
8/16/2007 [Akron Beacon Journal](#) Akron OH print: ran Marketwatch article
8/16/2007 [CBSNews.com](#) New York NY online: ran Marketwatch article
8/20/2007 [Sunday Tribune-Review](#) Greensburg PA print: ran Marketwatch article
8/20/2007 [Herald & Review](#) Decatur IL print: ran Marketwatch article
8/20/2007 [The Brownsville Herald](#) Brownsville TX print: ran Marketwatch article
8/23/2007 [Modesto Bee](#) Modesto CA print: ran Marketwatch article
8/27/2007 [The Sun News](#) Myrtle Beach SC print: ran Marketwatch article
8/27/2007 [The Virginian-Pilot](#) Norfolk VA print: ran Marketwatch article
8/27/2007 [The Press-Enterprise](#) Riverside CA print: ran Marketwatch article
9/04/2007 [Affluent West Palm Beach](#) FL print: contributed article
9/05/2007 [The Wall Street Journal](#) Atlanta GA print: interview
9/11/2007 [AuthorsDen.com](#) Bartlesville OK online: book review
9/12/2007 [Fort Worth Star-Telegram](#) Fort Worth TX print: ran Jean Chatzky column
9/12/2007 [San Ramon Valley Times](#) Danville CA print:Marketwatch article
9/12/2007 [Valley Times](#) Pleasanton CA print:Marketwatch article
9/14/2007 [Mature Lifestyles](#) Brandon FL print: Q&A
9/18/2007 [The Tampa Tribune](#) Tampa FL print: ran Jean Chatzky column
9/20/2007 [The Columbus Dispatch](#) Columbus OH print: Ran Marketwatch article
9/20/2007 [Daily News](#) New York NY online: Ran Jean Chatzky column
9/24/2007 [Times Record News](#) Wichita Falls TX print: ran Jean Chatzky column
10/04/2007 [Tulare Advance-Register](#) Tulare CA print: ran Jean Chatsky column
10/04/2007 [Daily Journal](#) Kankakee IL print: ran Jean Chatzky column
10/11/2007 [Waco Tribune-Herald](#) Waco TX print: ran Jean Chatzky article
10/12/2007 [Boomergirl.com online](#): ran Marketwatch article

*An excellent, incisive and common-sense guide...
Financial Planning Association*

"In a world where financial information and decisions have become increasingly overwhelming and complex, "Who's Sitting on Your Nest Egg" offers an excellent, incisive and common-sense guide of how the appropriate selection and use of a competent financial advisor can be a liberating and objective partner in managing your financial future."

Marvin W. Tuttle, Jr.

Executive Director/CEO

*★★★★★ An absolute "must" to apply when one's life savings are on the line! , November 4, 2007
-Midwest Book Review*

Certified financial planner Robin S. Davis presents Who's Sitting on Your Nest Egg? Why You Need a Financial Advisor and Ten Easy Tests for Finding the Best One, a no-nonsense guide that lives up to its title and then some. Written for readers of all backgrounds, Who's Sitting on Your Nest Egg? discusses the important role financial advisors fill in helping ordinary Americans, how to find the right health care source for one's needs, the problems affecting social security, pensions, and probate, how to avoid tax traps, and more. Of especial value is the simple ten-part test to determining a quality financial advisor - an absolute "must" to apply when one's life savings are on the line! Highly recommended.



FOR IMMEDIATE RELEASE

CONTACT: Jessica McMahon (772) 600-1076

WHO'S SITTING ON YOUR NEST EGG? How to Avoid a Retirement Disaster

WEST PALM BEACH, Fla.- As more and more Americans are entering or nearing retirement, many are turning to do-it-yourself financial guides to protect or enhance their wealth. Advice books from popular personalities like Suze Orman offer ways to bypass advisors and encourage taking your finances into your own hands. However, most people are not qualified or motivated enough to execute a sound plan for their financial futures on their own, creating a growing stack of abandoned advice books on coffee tables across the country.

Author and Certified Financial Planner™ Robin S. Davis says financial experts promoting do-it-yourself financial planning are doing the general public a disservice. Many of these personalities propagate the notion that all financial planners are untrustworthy, when in reality, they exist to help the amateur investor achieve financial independence. Davis's book, *"Who's Sitting on Your Nest Egg? Why You Need a Financial Advisor and Ten Easy Tests for Finding the Best One"* (Bridgeway Books, July 2007, 978-1-933538-80-8, \$22.95) reveals the importance of working with a financial planner and offers 10 easy tests to help you confidently identify the best planner for you.

Davis leverages 24 years of experience as a financial advisor to aid readers in discerning between the commission- hungry "salesmen" in the financial industry- those who have dollar signs in their eyes instead of your best interests at heart-and ethical, competent financial planners. She has made it her mission to educate the public on the importance of a well-managed financial plan. Davis's 10 tests for choosing the right financial planner include basic scrutiny every good advisor should pass, such as asking you for your tax return and having a large enough staff to properly manage clients.

"Most people need professional help in financial planning, but it is too scary to hand your life savings over to someone when you have no way to gauge what type of advisor they might be," says Davis, whose experience has centered on financial planning for older and retired Americans. "The first step to achieving financial freedom is finding a planner you can trust."

In her book, Davis discusses topics such as:

- Why you need a financial advisor
- The top 10 tests for finding the right financial advisor for you
- How to test your current financial advisor
- How to recognize advisor acronyms
- How to avoid tax traps
- The dwindling reliability of Social Security and pensions

Robin S. Davis owns Davis Wealth Enhancement Group, Inc., where she serves as the top advisor. She has been advising retirees and those nearing retirement since 1984, helping her clients reach their financial goals. A member of the Financial Planning Association®, Davis has held hundreds of public seminars around the country. She currently resides near West Palm Beach in Stuart, Fla., with her husband and two children.



To schedule an interview with Davis, or to receive a copy of *Who's Sitting on Your Nest Egg?*, please contact Jessica McMahon at (772) 600-1076 or jessica@daviswealth.com



West Palm Beach, Fla. – USABookNews.com, the premiere online magazine and review website for mainstream and independent publishing houses, announced the winners and finalists of **THE NATIONAL “BEST BOOKS” 2007 AWARDS** (BBA) on November 1, 2007. Over 500 winners and finalists were announced in over 140 categories covering print, audio books & courses, e-books and interactive CD-ROMs. Awards were presented for titles published in 2007 and late 2006.

Robin S. Davis, CFP won the award in the category of Business: Personal Finance for her title, **“Who’s Sitting on Your Nest Egg? Why You Need a Financial Advisor and Ten Easy Tests for Finding the Best One”**. The book is designed to give you the knowledge you need to be able to confidently identify a planner who may help you pave the way toward the long-range financial independence that’s so important to you and your family. Robert S., a retired General Electric Engineer, said “This is the most practical book on financial advisors that I have seen. It was informative, enlightening, and easily understood”.

Winners and finalists traversed the publishing landscape: Simon & Schuster, Penguin-Putnam, HarperCollins, Random House, McGraw-Hill, Houghton Mifflin Co., John Wiley & Sons & hundreds of independent titles contributed to this year’s outstanding BBA competition. Keen adds, “BBA’s success begins with the enthusiastic participation of authors and publishers and continues with our distinguished panel of industry judges who bring to the table their extensive editorial, PR, marketing, and design expertise.”

USABookNews.com is an online publication providing coverage for books from mainstream and independent publishers to the world online community. USABN Magazine Online is the monthly electronic magazine e-mailed free to a large cross-section of the book buying public. JPX Media, in Los Angeles, California, is the parent company of USABookNews.com.



Sample Interview Questions

For Robin Davis,

Author of **“Who’s Sitting on Your Nest Egg?
Why You Need a Financial Advisor and Ten Easy Tests for Finding the
Best One**

www.RobinDavisCFP.com

1. In your own words, what is financial planning?
2. What are a few tips that you can suggest in order to find a financial advisor you can trust?
3. How can you quickly decipher between a qualified, ethical financial advisor and a financial salesman?
4. Why shouldn't people do their own financial planning? And why is it so important to utilize the services of a financial advisor?
5. Is it better to you a fee only or a commission only advisor?
6. Why are baby boomers “sitting ducks” for quack financial advisors?
7. What are the top 5 money mistakes smart people make?
8. What are the 5 tools to retire confidently?
9. Why is financial literacy an urgent challenge in today's global economy?
10. With the market in such a volatile state, do you have any advice for investors?

Statistics

- “The North American Securities Administrators Association’s survey of securities regulators shows that an estimated 44 percent of all investor complaints received by the state securities regulators are made by seniors”
- “A new survey by “American Express Financial Advisors Inc. finds that those who seek help from a financial advisor save nearly twice as much for retirement than those who don’t seek advice.”
- According to the Government Accountability Office \$15 trillion is held by Americans 65 and older, the largest pool of assets ever amassed by an aging population.
- Only one in ten Americans today is financially prepared to retire when they reach age 65.
- Concluding from a year long examination of 110 securities firms and branch offices that sponsor sales seminars and offer a free lunch to offer attendees; the SEC, FINRA, and NASAA released their findings that 100% of the “seminars” were instead sales presentations, 59% reflected weak supervisory practices by firms, 50% featured exaggerated or misleading advertising claims, 23% involved possibly unsuitable recommendations, and 13% appeared to be fraudulent.
- According to a Baby Boom Retirement Savings index, published each year by Merrill Lynch, baby boomers are only saving 38.2% of what they will need to maintain growth-adjusted living standards in retirement.
- According to the Retirement Confidence Survey (RCS)-31% of Americans would rather *scrub a bathroom* than plan for retirement-
- According to economist, Ben Stein the average retirement savings of baby boomers has saved only \$50,000—or \$110,000