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Geier Financial Group
We're there for you. Keeping you ahead of the game.

May 2009

May News Release!



Welcome!

Spring has sprung and summer is on its way! Along with flowers, cookouts, swimming, and yes...allergies, May has brought about many changes we'd like to share with our clients, colleagues, and friends.

"Nothing endures but change." -Diogenes Laertius

We will keep you abreast of any new developments!



Recent Updates in Legislation



Photo by David Iloff.

Please click on the following links to read a detailed explanation of these recent changes in legislation:

[First - time Homebuyer Tax Credit](#)
[Deducting Sales & Excise Tax on New Vehicle Purchases](#)
[Credit Card Act of 2009](#)

[Market Week May 26, 2009](#)

Fidelity Electronic Delivery Now the Default Option

Printed documents used to be the default option for client communications. Now clients will receive all quarterly confirmations and statements via electronic delivery unless you select the "Opt -out" selection to get printed documents. Please e-mail Sharon Poehler at spoehler@geierfinancial.com regarding whether you would like to receive Fidelity documents electronically. She will provide your e-mail address to Fidelity, and you will receive a consent e-mail from them requesting you select "I agree" at the bottom of the consent e-mail. By choosing to receive your communications from Fidelity electronically the paper mail you currently receive will be cut back dramatically.

Please feel free to contact us with any questions or concerns.

Geier Financial Group Introduces "CLIENT VIEW"

In This Issue

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Geier in the Community

[Geier supports Howard Life Festival](#)



Junxure ClientView™ Live creates Private Client Web Portals to add to our existing web site that display individualized information by client. Private web pages enable us to receive, store and share important documents such as account information, trusts, wills, tax information, and even photos. ClientView™ Live generates the electronic files and builds the client specific, dedicated, URL page with secure logins and passwords on their secure web hosting platform, accessible through our website. This new program will give us the ability to store client bank books (for those utilizing our Bill Pay services), Quarterly

performance reports, insurance documents, estate planning documents, and much more safely and securely.

This program is being implemented in waves so not every client will be up and running at the same time. When access for your account has been established you will receive an e-mail from us with your login ID, password and instructions to connect to your information from our web site at www.geierfinancial.com. If at any point you have questions, please do not hesitate to contact us.

If you would like to continue to receive your quarterly reports and/or bank books via regular mail, please e-mail this request to Melissa Jordan at mnjordan@geierfinancial.com. It is important we have all of your updated contact information as this will be displayed in Client View Live. Please e-mail Melissa Jordan if you find data that needs to be updated when you access the program.

We are very excited to bring this new feature to our clients!

Geier Financial Group Looking to Provide More Options to Clients with EverBank

With the rise in popularity surrounding gold bullion and silver, as well as the attractiveness of foreign currency due to the weakening of the dollar we felt it prudent to find ways to bring these options to our clients. We are looking into the possibility of forming a relationship with EverBank, who has \$7.6 billion in assets and the support of approximately 1,500 employees headquartered in Jacksonville, FL.

Nearly 525,000 customers benefit from EverBank's high yields on checking, saving and lending products, and unique global market products such as foreign currency CDs. Despite the recent volatility within the financial services industry, EverBank remains stable. EverBank enjoyed strong growth during 2008. They had a record net income of \$46 million, a 52% increase from 2007, asset growth of 28% during the year to over \$7 billion, and bank deposit growth of 29% during the year, an increase of \$1.1 billion and the largest annual deposit growth in company history to over \$5 billion (www.everbank.com).

We will update you as things progress.

As you can see May is blooming with change. Please feel free to contact us at anytime with any questions or concerns.

As always, thank you for your friendship, support, and referrals.

Sincerely,

Melissa N. Jordan
Client Relationship Manager

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Geier Financial Group | 2205 Warwick Way | Suite 200 | Marriottsville | MD | 21104