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Business of the Week: **AMERICAN PROSPERITY GROUP (APG)**
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The Matthews Record
By George G. Moffat

WHAT

“You should have a better relationship with your money than the person who acts as your financial ‘therapist’”, offers William Romeo (“Bill”), the franchise holder for this area serviced by **AMERICAN PROSPERITY GROUP (APG)**. Romeo has operated the current office on Matthews-Mint Hill Road since October.

Romeo offers what he describes as “a second opinion” on an individual’s total financial picture. **APG’s** methodology is to offer tools to round out or to improve the performance of one’s assets, not to replace current investments or to churn accounts.

This is accomplished by employing the groups proprietary “**Trinity Method of Investing**”—a planning technique designed to “maximize your tax advantages and investment portfolio growth now while taking steps to protect, preserve, and perpetuate your assets”, states Romeo.

WHO

Bill Romeo has had extensive training in the APG methodology created by the company’s founder, Mark Charnet. Romeo has devoted over 100 hours in the company’s training process to master the understanding and use of the **Trinity Method of Investing**. He holds the Series 6 and the Series 63 NASD licensure, and holds both the North Carolina Life and Health Insurance license and the state’s Medicare and Medicare Supplement license. His wife, Maria, is the Office Manager of and, incidentally, the decorator of, the warmly tasteful, yet professional, office.

The Romeos have been residents of the area for over 10 years. They find Matthews to be an excellent place in which to conduct business. Bill is the first APG franchisee in Charlotte and the only one in North Carolina at present. Although the franchise is not necessarily an exclusive one, John Cannon, the APG General Manager in Wayne, NJ, states that APG does not establish another within the geographical area of a thriving business. Bill intends to thrive.

HOW

“We offer free of charge quarterly long term care, estate planning, and annuities workshops to small groups of 15 to 20 persons in our office conference area,” explains Romeo. He then offers free-of-fee planning services as a follow up to interested clients. During the workshops, Romeo never mentions specific companies; he discusses concepts. He uses PowerPoint presentations and discussions around a well-formulated free workbook. He keeps clients’ workbooks up-to-date with free revisions over the months immediately following workshops. Bill adds, “Leave your checkbook at home, and there is no net worth requirement to attend”.

During follow up, Romeo works with the client in the planning process whereby the client makes his or her own decisions on augmenting or bolstering the plans he or she may already have in place. The client’s goals and objectives are the foremost thing around which a more full plan results.

Romeo’s remuneration, if any, comes from commissions paid by any servicing company chosen by the client. However, Romeo emphasizes, he is not a broker for anyone or any company.

WHEN

There is a current free series this week; three session days, one each offered on estate planning, long term care, and analyzing annuities, at three different times each day. Obtain the next series dates by telephoning 704-708-5001, and watch for flyer-inserts and other advertisements over the coming weeks.

Interested parties also may schedule after hours and weekend appointments. There are sessions available to social, civic, and religious groups on their premises.