



# A financial services triple threat



## READER PROFILE: BILL LOSEY

- OWNER OF BILL LOSEY RETIREMENT SOLUTIONS, WWW.BILLLOSEY.COM, WILTON, N.Y.
- FATHER OF THREE BOYS, AGES 8, 9 AND 13
- OWNER OF TWO DOGS
- SANG THE NATIONAL ANTHEM AT MADISON SQUARE GARDEN BEFORE A NEW YORK KNICKS-SAN ANTONIO SPURS GAME IN OCTOBER 2005
- PARTICIPATES IN TRIATHLONS
- PUBLISHER OF A SERIES OF BOOKS CALLED 101 GUARANTEES. TOPICS INCLUDE MARRIAGE, THE STOCK MARKET AND HOMELAND SECURITY. THE INSIDE OF THE BOOKS IS BLANK, SINCE THERE ARE NO GUARANTEES.
- HELPS RAISE MONEY FOR THE SPECIAL OLYMPICS, MARCH OF DIMES AND THE AMERICAN HEART ASSOCIATION

If you think you can take the grilling and would like to be considered as one of our random readers, simply send an e-mail to [mwerling@seniormarketadvisor.com](mailto:mwerling@seniormarketadvisor.com).

**Senior Market Advisor: Who does Bill Losey Retirement Solutions serve?**

**Bill Losey:** I have a small client base of less than 40 people. A majority are pre-retirees and retirees. Our clients consist of educators, physicians, business owners, widows and divorcees. These people are all delegators who understand they don't have the time, talent or temperament to handle their own financial affairs.

**SMA: What is one thing people underestimate about retirement and/or retirement planning?**

**BL:** How much money they'll need to maintain their standard of living for 20 to 30 years. Most people don't have a clue, which is good for our industry.

**SMA: What brought you into the industry?**

**BL:** The ability to help people establish and achieve their goals. The ability to help people and earn a good living. The ability to have one career that would allow me to use my people, writing, speaking and broadcasting skills.

**SMA: If you could be the host of any game show, past or present, which one would it be?**

**BL:** Match Game.

**SMA: What is the most difficult leg of a triathlon?**

**BL:** The run, absolutely. You're dead at the end.

**SMA: Is it more difficult cleaning up after three boys or two dogs?**

**BL:** Definitely three boys.

**SMA: If you had a time machine, where would you go?**

**BL:** Back to the 1950s so I could grow up with rock and roll.

**SMA: Elvis or the Beatles?**

**BL:** Elvis.

**SMA: Gilligan's Island: genius or folly?**

**BL:** Folly.

**SMA: What would be more difficult: Completing the Iron Man triathlon or singing the national anthem at the Super Bowl?**

**BL:** The Iron Man.

**SMA: What should the 1970s be remembered for?**

**BL:** Disco.

**SMA: What will the 1970s be remembered for?**

**BL:** Disco.

**SMA: What is one guilty pleasure you indulge that even some people who know you might not know about?**

**BL:** I love watching reality TV shows. They're a nice break from my reality.

**SMA: Was Jimmy Buffett correct? Is it always a woman's fault?**

**BL:** No, it's always our fault.

**The one CD I can't live without is ...**  
"Billy Joel's Greatest Hits."

**The movie I can watch over and over is ...**  
"The Shawshank Redemption."

**The character I would most like to be in that movie is ...**  
Andy Dufresne. He escapes.

**If I had 20 spaces on a license plate, it would read ...**  
PLAY TO WIN.

**Raising three boys is like ...**  
pulling teeth.

**If I weren't doing what I'm doing now, I'd be ...**  
a professional singer.

**My favorite superhero is ...**  
Underdog.

**What did we ever do before ...**  
e-mail?