

Petersen & Associates



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We are members
of several
professional
insurance
organizations
such as...



Professional Insurance
Agents of Wisconsin



American Advantage
Insurance Group



National Association of
Insurance and
Financial Advisors

This Christmas, give the gift of Peace of Mind!

AAA memberships are the perfect stocking stuffer for everyone on your list!

Know a student driving back and forth from college? Concerned about an elderly parent getting stranded on the side of the road? Don't know what to get for that person who has everything?

How about a AAA membership!



A membership can be just the perfect gift for any family member, friend, child, or parent on your list! And for just \$63, it is affordable enough to give just about anyone!

But did you also know that a AAA gives you more than just peace of mind on the road? In addition to battery re-starts, towing services, lockout service and fuel delivery service, you'll also be eligible for...

- FREE TripTiks, Tourbooks & Maps
- Discounted hotel and travel rates
- Discounts on products such as eyeglasses, computers, athletic apparel, and prescription meds

Enclosed is a membership form you can complete & mail back to our office. **We are a AAA appointed agency**—call our office or visit www.aaa.com if you have any questions!



When you purchase a gift membership, we will mail either to you or to them a special certificate with their membership number and a packet detailing their membership benefits.

So don't worry...you will still have something to put under the tree for them!

The Tax Man Calleth!

IRA season approaches!

Don't pay Uncle Sam more than you absolutely need to! Call Ron Petersen today for IRA tips and tax beneficial information.

Also... More tax info on page 2...advice from the expert, Alan Jung, CPA!



Some companies we do business with:

- AAA
- Acuity
- AIG
- Allied
- American Collectors
- American Funds
- American Modern
- Amerisafe
- Anthem
- Austin Mutual
- Auto Owners
- Badger Mutual
- Blue Cross/Blue Shield
- Burns & Wilcox
- Dairyland
- Foremost
- Fortis
- Germantown Mutual
- Go America
- Golden Rule
- Hagerty
- Hanover
- Hawkeye-Security
- IMT
- Kemper
- Lincoln Benefit Life
- Mendota
- Midwest Family Mut.
- Pacific Life
- Partners Mutual
- Progressive
- Prudential
- Society
- The Hartford
- Tower Special
- Travelers
- Victoria
- Viking
- West Coast Life
- Windsor
- West Bend Mutual
- Zurich



Alan Jung, CPA
Ofc: (262) 432-0888

Advice from the expert—Alan Jung, CPA

Are you ready for your 2007 tax filing?

Deduction limits for qualifying IRA deductions remain the same for 2007—\$4,000 plus a \$1,000 catch up for age 50 and over. For the 2008 tax year, the limits increase to a \$5,000 plus the \$1,000 catch up.

Also worth noting for 2007, charitable contributions on Schedule A are requiring documentation for all cash donations—no matter what amount! Keep receipts or use donation envelopes. Non-cash donations such as clothing and household items now need to be in good condition to qualify. A photograph of the donated item/goods would be helpful.

Tax credits for qualifying home energy saving improvements are scheduled to expire on December 31, 2007. These improvements include expenditures for energy-saving doors, windows, and home insulation.

If you have specific tax questions you would like answered, you can make an appointment with Mr. Jung—he's located right in our office at 15171 W. National Ave.

Don't forget about our referral program!



The highest compliment we receive from you is when one of your friends or family members calls to set up insurance.!

When you forward our information to a friend or family member and they call us for a quote, we will send you a \$15 Applebee's Restaurant Gift card! This is just one small way we can say thank you for placing your trust in our agency!

I didn't know you...

Are you getting the most bang for your buck at Petersen & Associates? If you think we can only service your insurance needs, think again! We are also ready to custom-build an insurance plan for you which can include...

INSURANCE

Auto - Home - Umbrella - Motorcycle
 Boat - SR22 - Life - Health
 Long-Term Care - Medicare Supplements
 Business - Liability - Property - Equipment
 Workers Comp - Group Health

FINANCIAL PLANNING

Mutual Funds - Annuities
 401(k) Rollovers - IRA's
 529 College Savings Plans

...just to name a few! Check us out on the web, or call an agent today!

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