

Outlook Triangle Business Profiles

Diversified Estate Services, LLC Exposing Financial Misconceptions and Creating Wealth

“The problem...is not so much what people don't know; the problem is what people think they know that just is not so.”

— Will Rogers

The world is flat. The earth is the center of the universe. The Titanic is unsinkable. These were all widely accepted “truths” that turned out to be dead wrong. What other certainties will eventually be proven false? How about almost everything you've ever learned about financial planning?

North Carolina-based Diversified Estate Services, LLC specializes in helping clients relearn what they thought they knew about their finances. For instance, many people believe their home is their biggest asset. But according to Managing Partner Rick Parkes, the equity in an investor's home is just “lazy, idle dollars.” Putting money in a 401(k) above the employers matching funds is also a misguided concept, he says. Diversified Estate Services is dedicated to discovering the hidden wealth that most people are inadvertently losing. By redirecting those funds using cutting-edge financial strategies, the firm is able to



(from left) Rick Parkes, Managing Partner; Lisa Orr, Administrator; and Radon Stancil, Managing Partner of Diversified Estate Services, LLC's Cary office in MacGregor Office Park.

enhance its clients' estates and provide a comfortable and rewarding retirement. In fact, Managing Partner Radon Stancil says they can create retirement funds worth a million dollars or more without any additional outlay of money from the investor.

“We teach our clients an alternative approach, with an emphasis on safety, liquidity and growth, while tax advantaged,” says Parkes. “We prefer safe investment options over the unpredictable market. We help our clients benefit from market upswings, without suffering the market downtrends. Their money also remains accessible in case of an emergency.”

return rates. Many times, they are able to show their clients better alternatives for their existing 401(k) or IRA. One strategy, for example, provides guaranteed retirement income that cannot be outlived. It provides flexibility and choices that put clients in control of determining when and how much retirement income they receive.

In addition to Diversified Financial Services, Parkes and Radon co-founded the N.C. Educational Institute where they offer continuing education programs to other financial services professionals.



Owners Rick Parkes and Radon Stancil

Experience Makes the Difference

Owners Rick Parkes and Radon Stancil have more than 35 years of financial services experience in the Research Triangle area. Over that time, they've gained the respect and loyalty of their clients by helping them along the path to financial freedom.

Their extensive experience allows them to assess a client's financial situation and know whether they can help that client take advantage of tax laws to invest in safe, liquid financial products with attractive

Diversified Estate Services Can Help You:

- Avoid losing up to 50 percent of your IRAs and 401(k)s to taxes and penalties
- Transfer 401(k)s and IRAs to your heirs with no tax burden
- Pay off your 30-year mortgage in less than 15 years without making additional payments
- Accumulate and transfer money tax free
- Plan for college expenses
- Ensure that your retirement income lasts as long as you do
- Understand why maxing out your 401(k) is a mistake
- Build a retirement of millions of dollars without taking additional money out of your pocket

DIVERSIFIED ESTATE SERVICES, LLC *Preserving your wealth*

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