

Ogan Financial Group, Inc.

True Wealth Management



980 Enchanted Way Suite 206
Simi Valley, CA 93065
805.527.8806 Office

In the News...

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Doing Good Defines Rich

It's not how much you earn, but how much you help



By **Terry Paulson**, terry@terrypaulson.com
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How do you define rich? Is it the one who dies with the most toys or the largest stock portfolio? Is it defined by how high you climb on the Forbes "World's Billionaires" list? Or is it better defined by the personal riches that come by serving and making a difference for others? Recent experiences have reinforced my belief that living rich lives is far more important than merely "being rich." The return on your life is more important than the return on your investments.

Janel Perez, a nurse practitioner here in Ventura County, recently returned from a Project Compassion medical mission trip to Huatulco, Mexico, and shared her experiences with other members at Westlake Lutheran Church. The passion and joy that radiated from her as she talked about her mission experience spoke volumes about what it is to "truly be rich."

"I received much more than I gave," she said. "My life will never be the same. The hardest part is explaining to my husband how there is a way to use our money better than putting in a swimming pool. My priorities have changed, and my faith is so much stronger. I look forward to being able to go again."

Tim Richardson, professional speaker and founder of "The REAL Richest People List" (<http://www.TheRichestPeopleinAmerica.com>), echoed Janel's sentiments.

"I believe too much emphasis is placed on material wealth and not enough on the wealth and richness that are truly important and fulfilling," he said. "True richness comes from the love of giving back to society and happens whether you make \$10,000 or \$10 million a year. It's not just about how good you are; it's about what good you do."

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- Tim Richardson, Founder of "The REAL Richest People List"

Tim has started his "REAL Richest People List" in hopes of inspiring businesses and individuals to give more of their profits and their time in making a difference in the world. Recipients are honored not by how much they have, but by how much they give. Here's a sampling of nominees from this year's list.

— Carol Schillios, a credit union consultant and founder of the Fabric of Life Foundation, has helped Mali's poorest of the poor — young begging girls — learn sewing, fabric weaving, dyeing and beading skills to generate income and break the cycle of poverty.

— John Wood, founder of Room to Read, has helped open more than 280 schools and 3,600 multilingual libraries across the developing world, distributed more than 2.8 million children's books and supported more than 2,300 girls with long-term scholarships.

— Nancy Rivard, an American Airlines flight attendant and Founder of Airline Ambassadors, coordinates missions to hand-deliver supplies to children in need and escort children who need medical care. Nancy affirmed: "A life oriented around oneself does not ultimately bring happiness. A life oriented around others does."

Tim is accepting nominations for next year's list with the goal of announcing the "400 REAL Richest People in America" as Forbes releases its "Richest Americans" list. Tim is now traveling the country showing

companies and organizations how to experience greater richness by supporting giving. Richardson claims that there is a direct correlation between giving and employee morale, customer loyalty and even corporate profitability.

Send in your nominations now, and if you want to explore this approach to richness further, see the movie, "The Ultimate Gift." As you unwrap this movie gift, you'll laugh, you'll cry and you'll be reminded of the gifts life provides — the gifts of work, friends, family, money, learning, problems, laughter, dreams, giving, gratitude, love and the gift of a day.

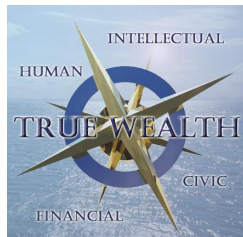
This FoxFaith inspirational drama brings to life Jim Stovall's novel and boasts a stellar cast that includes James Garner, Brian Dennehy and young Abigail Breslin, fresh off her Oscar-nominated performance in "Little Miss Sunshine." The movie title refers to an intriguing enticement offered to a spoiled grandson by his recently deceased and extremely wealthy grandfather. Via a series of video messages, the grandfather promises the irresponsible young man that if he completes a series of tasks — "gifts" — he may receive a substantial inheritance. After enduring a series of humiliating episodes in which he experiences life as a homeless person, does backbreaking labor at a ranch and travels to South America to come to terms with the death of his father, the young man begins to change. We watch him find a life-changing relationship with a beautiful single mother and her feisty young daughter who is dying of leukemia.

Enough of the story line. This movie will challenge you to have conversations with your own children and grandchildren about the things that matter most in life. Instead of just leaving them money, you might want to leave them a few more meaningful messages. "The Ultimate Gift" will leave you thankful for the blessing life provides when lived richly.

At this tax time, take a moment to count the blessings you have received by making a difference for others. There are no taxes due on those riches.

— Terry Paulson, of Agoura Hills, is a psychologist, speaker, author and host to the PoliticalTalk Blog. Contact him at <http://www.politicalassessment.com> or at terry@terrypaulson.com.

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OGF: What is TRUE WEALTH? Wealth is usually associated with the accumulation of assets. Most people usually think of their house, cash, stocks, bonds, and real estate. These "things" constitute our Financial Assets and represent our material possessions.

But, if I were to ask what their most important assets are, most people would list their family, health, relationships, values, morals, and heritage. Human Assets represent people rather than things and when fully considered, are of greater worth than our Financial Assets.

Another category of assets represents the wisdom we gain in life. This is a product of knowledge multiplied by life's experiences – both good and bad. Intellectual Assets also include our formal education, reputation, systems, skills, ideas, and traditions.

The government defines Civic Assets (taxes), as those assets we must put back into society. We define Civic Assets as all contributions, of any kind whether Financial, Human, or Intellectual, that employ our assets in the most efficient manner for the benefit of society.

True Wealth focuses first on our family values and goals eliminating any dangers to our Human Assets while utilizing our family's strengths to capture any and all opportunities that will enhance and preserve these valuable assets enriching our immediate family as well as future generations. We ought to focus on: *Preserving* the assets, *Protecting* true wealth, *Perpetuating* it to future generations, and *emPowering* family members with stewardship and accountability of more than just financial assets.

Ogan Financial Group, Inc. assists families in identifying their stewardship to True Wealth by creating systems, strategies, and structure for family and financial empowerment, with ongoing accountability, while retaining choice and control. To learn more about True Wealth Transformation, visit our website at www.OganFinancialGroup.com