

Up and Down with your Finances?



Isles Financial Solutions' Stay Ahead Funds can help smooth out the bumpy road

With a **Stay Ahead Fund**, you can deposit a lump sum (e.g., portion of your tax refund) and schedule it to be electronically deposited back into your regular checking or savings account when you need it. This helps smooth out expected drops in monthly income (e.g., reduced hours, less overtime) or increases in expenses (e.g., winter heating bills, holiday costs, summer activities).

If something comes up and you need the money sooner? No problem. There are no penalties for early withdrawal.

To learn more, contact Patricia Berhau at
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