

Associates



David Gray Personal Marketing Assistant

- New Business Coordinator
 - Published Author
 - BS History/Minor in Political Science and International Relations

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Trevor Swearingen Operations Manager

- Beneficiary Specialist
- New Business Coordinator
- Client Service Specialist
- BS in Finance, Accounting and Economics

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Shannan Penaflo Relationship Coordinator

- Workshop Specialist
 - Autism Mom
- BA English/Communications and MA Theological and Biblical Studies

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Special Care Planner



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Financial Planning
Insurance and Investment Services
Special Needs Planning



**Every financial plan is
important, some are**

Special.

a passion..

..to help people

My approach to the financial planning process.

A passion to help people is the foundation of my financial planning practice. With over 30 years of experience . I help people plan for the future and attain financial freedom for themselves and their loved ones. I am blessed to participate in such a breadth of human experience. Working closely with clients, we set realistic personal and financial goals and develop a comprehensive financial plan that helps guide clients to achieve their education, retirement, investment and estate planning objectives. Many existing clients look to me for assistance with their business and personal insurance and investment needs, including life, disability income, long-term care, annuities and mutual funds. My passion to serve is born out of my personal journey as a parent of a child with special needs. As a Special Care Planner, I help families who have children or other dependents with special needs address the serious questions concerning their future well-being. Through an in-depth knowledge of special needs trusts, insurance, guardianship, rules relating to government benefits eligibility, organizations serving the special needs community, and strategic alliances with Special Needs Attorneys, I work together with parents or caregivers to help ensure lifetime care and quality of life.



Gordon resides in Hamilton County with his wife, Alice. Pictured with their children: Liz, Emily, and Matthew.

My educational Special Needs Planning Workshops.

I provide as a way of giving back to the community free educational workshop for Special Needs caregivers. These workshops focus on how families can overcome the legal, governmental and financial obstacles when planning for their child with special needs. The topics covered include: Medicaid, Waivers, Social Security, ABLE accounts, Special Needs Trusts, Letter of Intent, and importance of a Will. If interested in hosting a workshop for parents, families, caregivers, or direct service providers please call or email Shannan Penaflor or myself.

work toward achieving ..

..lifelong financial freedom

FINANCIAL SERVICES

- **Financial Planning**
- **Special Needs Financial Planning**
- **Investment Planning**
- **Insurance Planning**
- **Retirement Planning**
- **Estate Planning**
- **College Funding Strategies**

PROFESSIONAL AFFILIATIONS

- **Financial Planning Association**
- **Indianapolis Estate Planning Council**
- **National Assn. of Insurance & Financial Advisors**

COMMUNITY ALLIANCES

- **About Special Kids**
- **Autism Society of Indiana**
- **Family Voices**
- **Down Syndrome Indiana**
- **Down Syndrome Kentucky**
- **FEAT (Families for Early Autism Treatment)**
- **Special Olympics Indiana**
- **Special Olympics Kentucky**
- **FUSE (Families United for Support & Encouragement)**
- **VIPS of IN & KY (Visually Impaired Preschool Services)**
- **ARC of IN & KY**
- **Easter Seals Crossroads**
- **Janus**

My goal is to help clients achieve lifelong financial freedom by building long-term working relationships based on mutual respect, ongoing education, and comprehensive planning.