



Family Financial
Services

Financial Life Planning with Purpose*

A Case for Family Financial Services

For the most part your personal finances seem to be under control. You make a decent income, and you are able to pay all of your bills on time. What you may not know is whether or not you are on track for retirement, or any other goal. Since you have never really defined, “How much is enough”, aiming for a target you can’t see has become quite frustrating and even scary at times.

Every April 15th you wonder whether or not your tax return has been filled out correctly and claims the maximum refund you are entitled to. Basically, because of the complexities and overwhelming number of choices we have for investing, planning, and taxation, you are beginning to wonder if it is time to seek professional help.

Successful people you know seem to be content, confident and possess a sense of peace about their future plans. Do you know someone to ask for help in moving toward a success such as that?

- What if there was a way to define “How much is enough?”
- What if there was a way to get to know, like, and trust a local professional that specializes in fee-based planning, taxation and the management of your finances around your life, values, and beliefs?
- What if the services of such a professional were affordable and offered great value toward pursuing a life of confidence, contentment, and a sense of direction about providing for your family, your purpose in life, or your future plans?

Maybe it seems easy enough, but our experience tells us something different.

Successful Financial Life Planning depends upon a balanced integration of its three components:

1. Financial Industries; knowledge of the various products, services and the associated fees
2. Life; your preferences, beliefs, values, and goals
3. Planning; a process which considers:
 - a. who you are as a person or family
 - b. your current situation
 - c. how you envision your ideal future
 - d. your options for realizing that future

The completed process results in a rare document, the financial plan. It is a sad reality that most people will never make the effort to develop a written plan to achieve their goals. The fortunate and wise few that do will have a guide to:

- keep them on track
- a means to monitor their progress
- most importantly, a written record of *why* they are pursuing the goals they have chosen.

The truth is, when times are tough and difficulties are distracting us from our goal, a reminder of *why* we chose to pursue a particular goal can be the source of strength we need to stay the course ...or ... the justification for defining a new direction.

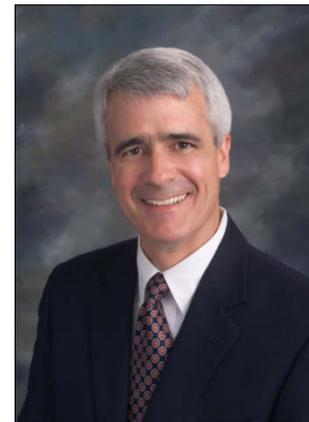
There are firms today that might suggest that they can help you develop a financial plan which considers your life in the process. There are advisors or brokers for large national firms who are very technically competent and sincerely *want* to help you achieve your goals. Not always, but more often than not, because of their company requirements, the plan they present is merely a marketing effort to sell their products. Is that O.K.?

I have chosen to operate as a fee-based planner. This means that I do not sell any commission-based products or services. Given the right set of facts and circumstance, a commissioned based product may be the right choice for an individual. In such a case, I would recommend this individual to a qualified and credible commission based representative.

Life with fulfillment is the goal. Wealth is merely a tool.

Hello and thank you for taking the time to consider this case for Family Financial Services (FFS). My name is Jeff Robinson and I established FFS in 1992. From its beginning the goal of FFS has been to help you integrate your finances into your life's plan and achieve your goals – from investment planning and income taxes to retirement and beyond. I believe I am uniquely positioned to help you achieve your goals. I have developed and use with every client a very personable and life centered exploratory planning process. It includes, but goes beyond the financial planning standards as established by the CFP® Board of Standards.

The industry standards are numbers and technology centric. Whereas I feel the numbers are critical and the technology enables me to leverage my energy, the overall process should be life centric. This perspective allows me to remain focused on your life's direction and goals, and at the same time enables me to make educated and insightful recommendations for achieving your life purpose as you see it.



Jeff Robinson
Founder

The reason I feel I am uniquely positioned to help you is due, in part, to my unique training and credentials. My passion to help others understand and make

*Jeff Robinson, Advisory Representative, Securities offered through H.D. Vest Investment ServicesSM, Member SIPC, *Advisory services offered through H.D. Vest Advisory ServicesSM, 1500 McAndrews Rd. West, Suite 219, Burnsville, MN 55337 952-890-6611.

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the most of their Life Wealth* has been intentionally empowered through the training I have completed in preparation for serving you. I am currently the only financial professional in Minnesota to be licensed as a Certified Financial Planner™ (CFP®) and Enrolled Agent (E.A.), in addition to being qualified by Kingdom Advisors (QKA).

[Learn More About Our Services](#)

Guidance You Can Trust

I am not trying to insinuate that *I* am more trustworthy than the next advisor. I am saying trustworthy guidance isn't entirely a matter of personal ethics. The *source* from which the guidance is offered needs to be trustworthy. What is the source of the counsel you receive?

As a Qualified Kingdom Advisor I have been trained and have committed to be a person of character who, from a Biblical world view, serves you with Biblical financial principles and advice.

But what if you do not hold to Christianity? I agree with most other Kingdom Advisors and my friend Dan Hardt, CFP® of Dan Hardt Financial in Louisville, Kentucky states it best:

“We don't think it's our job to preach at our clients or to tell clients what they should believe. We always remember that it is *the client's* money with which we are planning and it is *the client's* goals and priorities that are paramount. However, we consider it a blessing that - when a client so desires - we are able to work together, seeing the strong connection that can exist between sound financial planning and spiritual growth. When done well, it becomes Christ-centered financial planning and a part of a great adventure with our Creator. We work with clients who want us to take this approach as well as with others.”

[Learn More About Us](#)

Strength through Collaboration

No man is an island; nor is any company. Our unique ability to help you address your tax and financial questions is further strengthened by the industry partnerships we've developed.

[Learn More About Our Partners](#)

Is it Time?

Is it time to seek credible and competent help with your investments*, financial planning*, taxes, or any combination of the three? Do you value wise counsel in meeting your responsibilities as a good steward? If so, please consider Family Financial Services. I offer a no-obligation meeting where *you decide* whether or not FFS is the firm uniquely suited to help you with those needs.

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[Contact Us Today](#)

The chances are you have put this off for many months, if not years. Call or email me today and take the first step toward pursuing your preferred life. I personally look forward to hearing from you.

Jeff Robinson E.A., CFP™, QKA

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Conveniently Located

FFS is located just south of Minneapolis in Burnsville

Our Minnesota local service area includes Burnsville, Lakeville, Apple Valley, Prior Lake, Shakopee, Farmington, Savage, Rosemount, Elko, New Market, Chaska, Edina, Bloomington and Eagan; however, our services are also available to our neighbors throughout Minneapolis, Saint Paul, Rochester, and the greater Twin Cities metropolitan area.

**LifeWealth™ is the accumulation of financial, relational, physical, spiritual, and proficiency (intellectual) capital. True personal wealth will happen as a result of balancing each of these dimensions of wealth. You have already established a level of equity in all five of these dimensions, so the issue on any one of the dimensions is a matter of degree. We provide an instrument designed to offer you a profile of your current LifeWealth™ equity.*

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