WELCOME TO FINANCIAL PLANNING FOR ALL

Here for your investment needs.

REACHING YOUR FINANCIAL GOALS.

When it's time to make critical financial decisions about your future, you need sound, objective advice from someone who knows you well.

Make sense of investment planning.

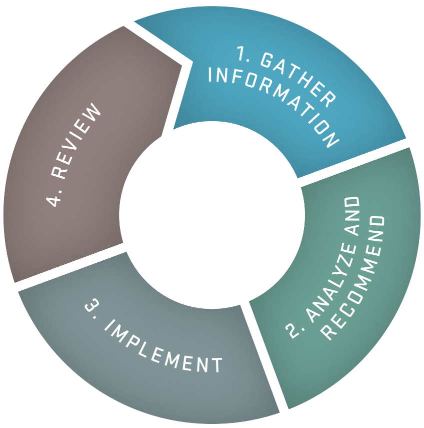
We offer experienced, knowledgeable professionals to help you build a strategy that works for your needs and goals. We can help with every aspect of your financial roadmap. Let us:

+ Evaluate and establish asset protection, including insurance needs.
+ Help invest assets for education and retirement.
+ Protect wealth while assisting in legacy and estate conservation.

We offer products and services and tailor our approach to your individual financial needs. Whether you're looking for help with a specific goal or looking to design a comprehensive investment planning strategy, we're the resource you can look to for all of your financial services needs.

A road map to success.

Working together, we'll create a road map for achieving your goals based on investment and protection principles.



1 GATHER INFORMATION.

As you share your goals and aspirations with us, we'll listen carefully and conscientiously in order to begin creating a plan for your financial future.

2 ANALYZE AND RECOMMEND.

By closely considering your financial needs and wants, we'll evaluate your options and share our best recommendations with you.

3 IMPLEMENT.

We'll provide you with advice regarding financial products and services designed to help you reach your goals.

4 REVIEW.

We know that people, circumstances, and economies change. That's why we're committed to an active, capable role in your future, periodically re-evaluating the goals you set forth at the outset.

Expect professional service.

Sound, objective financial advice. You'll receive advice and recommendations personalized for your individual goals and financial situation.

Experienced financial service representatives. Our representatives are licensed, registered investment planning professionals. Through ongoing training in insurance, investment, and financial planning capabilities, they offer knowledge and experience.

Careful analysis. We help you analyze opportunities and evaluate results.

Comprehensive financial choices. Because we're always evaluating and upgrading our products and services, you can choose from a wide variety of mutual funds, stocks, bonds, insurance, and annuities when it comes time to implement your direction.

Personal service. You can be confident that you're getting practical advice with service you can count on. We'll treat you as an individual and be your professional resource, helping you achieve your long-term financial goals.

Capability meets confidence.

Let us better help you reach your financial objectives by sharing your aspirations with us. The more information you share, the more accurately we can assess your financial potential. Any and all information you disclose is kept strictly confidential, as is required by law. We can assure you that we will serve you with respect and integrity.

The active advantage.

The most critical component of your financial plan is you. As such, your investments and insurance should fit you well. In order to optimize your opportunity for success, you need someone who understands your complete financial picture. Help us help you by providing current, accurate information on your financial situation, such as:

+ Bank and brokerage account statements
+ Employee benefit statements
+ Federal and state income tax returns
+ Financial goals and objectives
+ Insurance policies

Business With Integrity.

Business With Integrity is our quality standard that represents service and dedication to your needs. It means your representative is trained to:

+ Listen carefully and conscientiously to your needs and goals.
+ Conduct a thorough financial analysis before recommending any products or services.
+ Provide sound recommendations in line with your needs and goals.
+ Review your total portfolio, including investments, retirement plans, insurance, annuities, and more, to ensure that all your assets are working together toward your goals.
+ Meet with clients when they request a review of their financial situation.
+ Participate in continuing education and training in an effort to consistently improve service.
+ Grow a relationship built on trust and transparency.

CBSI-3114851.1-0620-0722