M FINANCIAL
PLANNING SERVICES, INC.
Comprehensive Wealth Management Services for Business Owners, Executives and Their Families

WHO TO CALL

PHONE 856-810-7701

Our team members are equipped to help you each time you contact our office. If you're not sure who you should talk to, please use this call list as a starting point.

Jessica handles much of the correspondence that you receive regarding your accounts and customer service relations.

- If you have a question about paperwork
- If you need a distribution
- If you need to schedule time with your advisor

JESSICA@MFINANCIAL.US

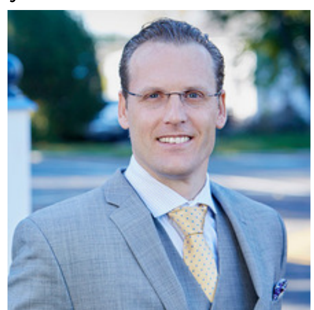
Scott handles much of the financial planning, research, insurance and account reporting.

- If you have a question about your financial plan
- If you have a question about an annuity
- If you have a question about an insurance policy
- If you have questions about account distributions

SCOTT@MFINANCIAL.US

Eric assists advisors with comprehensive financial and investment planning, insurance and estate plans.

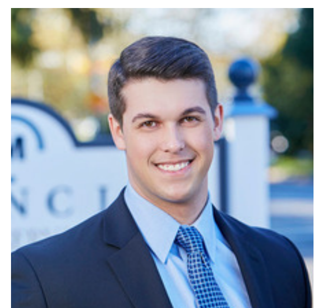
- If you have a question about your financial plan
- If you have a question about an annuity
- If you have a question about Accountview, Wealthvision, or viewing your account online



ERIC@MFINANCIAL.US

Michael assists advisors with comprehensive financial and investment planning, insurance and estate plans.

- If you have a question about account distributions
- If you have a question about Accountview, Wealthvision, or viewing your account online



MICHAEL@MFINANCIAL.US

Jennifer handles our marketing and event planning.

- If you have a question about an event
- If you have a question about an ad you saw in print or online

JENNIFER@MFINANCIAL.US