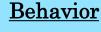
Mission

Striving to positively effect and improve the quality of life of all those interacted with, especially clients who I commit to educating customizing, and monitoring their financial situation; bringing them clarity and confidence to all their financial decisions. My goal is to create long term relationships to help guide valued clients in harvesting their financial success.

<u>Values</u>

>Treat each client as if they are the one, most important client. >Respect each concern, worry, question, challenge that a client has as the most important item of the moment. >Treat each client's portfolio and protection program as a unique, individual priority. >Looking out for the welfare of my client before my own interests. >Doing my very best to understand each client, their values, goals, level of risk, and personal beliefs to better serve their interests.



>Listen to the concerns, dreams, fears, and goals of each client. >Ask question and listen to

responses to more fully understand client's situation. >Seek and recommend the best solutions to provide the best opportunity for client's increased quality of life and ability to be independent and secure in all they do. >Seek out answers to challenges in areas where I might be less knowledgeable.