**Financial Planning Firm Bio**

**Real World Personal Finance Software**

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**Financial Planning Firm Bio Example**

***Financial Management Group*** provides personalized and practical financial advice to businesses and individuals.

Our clients benefit from the knowledge and experience of *Financial Management Group* associates, as well as sophisticated computer software support. As a member of a growing national network of 21 affiliated offices of *First Financial Resources*, we have unique access to specialized products and information**.** Financial Resourcesoffices throughout North America assist in providing financial planning and investment management services to Northwest clients.

Our typical business clients are closely-held and are active in wholesale, retail, banking, real estate, professional services, construction, manufacturing, health care and food service. We advise our business clients on successor (buy and sell) planning, pension, profit sharing, employee benefits and incentive plans.

Our individual clientservices include all elements of personal financial planning from budgeting to investment advice to estate planning. We work with our clients to determine their objectives, and then devise sound strategies for achieving their objectives.

We work closely with the clients' accountants, attorneys and other advisors. We do not practice law or accounting, but are conversant with the major points of law and regulations that affect a client's financial statement.

*Financial Management Group’s* origin was the establishment of the area’s first insurance agency in 1979. We continue to serve many business and personal clients of that era, as well as their later generations and successors.

*Financial Management Group* is committed to increasing the net worth of our clients. Our firm provides experienced, practical advice and a broad range of high quality, cost effective products and services.

***Financial Management Group*** has access to a wide variety of financial products and services for our clients.

**Investment products** recommended are those found suitable for the client based on the client's investment objectives and risk acceptance. Investments available include mutual funds, private managed accounts, limited partnerships, private placements, REITs, variable and guaranteed tax-deferred annuities, asset management accounts, unit investment trusts and insured certificates of deposit. We do not recommend individual stocks and bonds, but will accommodate the purchase or sale of listed securities upon the client's request.

**Investment services** include such things as trust accounts, self-trusted IRA's, 401(K) design and administration, pension plan design and administration, pre-retirement financial counseling, and pre-retirement seminars for employee groups. Trust accounts, pension design and pension administration accounts are placed with knowledgeable regional and national firms with proven performance records.

**Insurance products** are placed with 50 major companies rated "A" or better and include well known companies such as American General, First Colony, Guardian, Manulife, Massachusetts Mutual, Metropolitan, New York Life, Pacific Mutual, Paul Revere, Phoenix Home, Principal, Provident Mutual, Prudential, Security Life of Denver, Sun Life, Transamerica, and UNUM.

Insurance products recommended to our clients are based entirely on the needs of the client *-- we are* *carrier neutral*. Needs are determined by an extensive fact-finding procedure, including cash flow and risk considerations. Using present value analysis, historical performance data, investment risk analysis, and productivity ratios screens insurance products recommended to the client. Diversification among two or more carriers is routine.

## History and Background of the Financial Planners in Our Office

**John M. Sample**

John entered the financial services business in 1973 with Metropolitan Life Insurance Company. With 36 years experience, John has become a skilled and imaginative advisor in the use of life insurance and managed investments.

He has a Bachelor of Arts degree in business administration from the University of Oregon, and a Master of Science in financial services from the American College in Bryn Mawr, Pennsylvania.

**Mary S. Sample**

Mary is a Certified Financial Planner (CFP). Her Bachelor of Science in accounting is from the University of Florida. Mary's financial advisory career began in 1989 with business consulting work as an employee of Ernst and Young and has continued since her association with Financial Management Group in 1996.

Her practice focuses on advising individuals and small business owners in the planning and implementation of wealth management strategies, retirement planning and estate conservation.