



It's not just the plan.
It's the results.



Professional
Advice

Vision

To be the premier financial planning firm in the Mid-South by providing professional advice, quality products and excellent service.

Mission

To enable our clients and associates to define and achieve their financial dreams and goals while building relationships that last a lifetime.

Quality
Products

Values

The core values that guide us to achieve our higher calling of serving our clients are integrity, trust and mutual respect.

Excellent
Service

Investments and fee-based planning offered through Securian Financial Services, Inc., member NASD/SIPC. A Registered Investment Advisor. Shoemaker Financial is independently owned and operated.



A Message from the President

Anyone who works for or with Shoemaker Financial knows this is a company committed to quality. We select only the best people to join our team. We associate with premier organizations across the country to enhance our capabilities. We are a values-driven company that serves our clients as well as a higher calling.

As a highly successful full-service financial planning and investment management firm, we are able to pull extensive resources from within our organization, as well as from our impressive list of associations to benefit our clients.



Shoemaker Financial was established in 1978 by James H. Shoemaker, president of the firm.



Professional Advice

Financial Planning

Shoemaker Financial is one of only three Financial Planning Resource Centers in the nationwide Securian Financial Network.

Your personalized financial plan will address the following areas:

Protection and Risk Management—We examine your current arrangements and help you identify and quantify your protection needs, to help assure your financial security and that of your family in the event of your death or disability. This review may include life, health, annuity and income replacement plans.

Investment Allocation Planning—We establish whether your assets are currently allocated appropriately and make recommendations according to your goals, objectives, risk tolerance and desired level of return. As part of this analysis and plan, we determine if you have adequate accessible funds for financial emergencies.

Accumulation for Special Goals—We assist you in appropriate investment planning decisions for significant outlays such as your children's college education or even that dream retirement home.

Retirement Planning—We coordinate your current retirement savings program and calculate the amount necessary to fund a program which will maintain or improve your pre-retirement standard of living. For those at or near retirement, we help you plan how to invest your company pension payout so it provides the income you need. Preservation of assets is a key consideration in this area.

*Estate Planning*¹—We help you arrange your estate to minimize the tax burden on your heirs, while ensuring an orderly disposition of assets according to your wishes.

Implementation and Support—It's not just the plan. It's the results. Your personal financial advisor can facilitate the implementation of your financial plan. A plan sitting on a bookshelf is of no value. Over the years your plan is monitored and periodically reviewed to determine any changes that need to be made to fit your personal situation or economic conditions. As changes occur in your family or work status, we offer flexibility to adjust for these new circumstances.



¹ Some of these strategies may also require the services of an attorney and/or CPA.

Quality Products

Wealth Management

Unlike many financial services firms, Shoemaker Financial has its own asset management department with a staff of experienced and highly qualified managers. You can rest assured that your investment portfolio will be managed by a local professional—someone who lives and works here in the Mid-South. Shoemaker's experienced portfolio managers are available for consultation with you and your own financial advisor. We also have an on-site Service Department. For Shoemaker, this is still a people business and we encourage periodic discussions of your financial goals—face to face. This is how we build relationships that last a lifetime.

Quality Products for Individuals

Shoemaker Financial offers a wide range of products and services through our broker/dealer Securian Financial Services, Inc. Our financial advisors can assist you with information about any of the following products.

- ? *Insurance*—Life, Long-Term Care, Disability Income and Major Medical.
- ? *Investment*—Mutual Funds, Annuities, Equities, Bonds and more.
- ? *Wealth Management*—Fee-Based Planning and Asset Management.



Excellent Service



Business Solutions

A successful business must incorporate profit-driven management and sophisticated employee retention tools into its repertoire in order to survive and prosper. The financial professionals with our Small Business Team have the knowledge and tools to help your business maximize its potential.

Employee Benefits—Our in-depth annual reviews help to assure that you are getting the maximum desired results for the benefit dollar allocated.

Compensation Strategies—Customized executive compensation strategies that go beyond paychecks and ERISA benefits to help you hold on to your most critical rainmakers and project managers.

Business Succession Planning—Ensure continuity and security to ownership, managers and front-line employees alike.

Financial Education Programs—Enhance your employees' understanding of how to incorporate your benefits with their own savings, investment and insurance plans. Encourage good money management, goal setting and long-range financial security.



Results

Professional Advice

Shoemaker Financial is represented by some of the Mid-South's most knowledgeable and successful financial professionals. Our clients benefit from the expertise of their own personal financial advisor, as well as the cumulative experience, talent and knowledge of all the members of our organization. Our team includes certified financial planners, investment specialists and retirement plan administrators.

As a needs-based planning firm, we use a series of discussions and financial analysis to help you determine your goals and priorities. Using your financial analysis, we examine all areas of your finances and help you coordinate each of them to define a well-balanced plan of savings, investments, asset protection and preservation.

Talk to Us about Results.

We'd like to talk to you about your financial future. It's not just the plan. It's the results.

Shoemaker in the Community.



Shoemaker Team– American Heart Association HeartWalk



Charity Golf Tournament to benefit Nashville's Youth Life.



www.shoemakerfinancial.com

Shoemaker Financial is headquartered at 2176 West Street, #110,
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*Securities and Investment Advisory Services offered through
Securian Financial Services, Inc., Member NASD/SIPC. Shoemaker
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