

WHAT CAN I DO FOR YOU?

My goal is to assist my clients in achieving their financial goals. I do this by providing the products and services which can be used to fund the major events in life. These events include: retirement, business opportunities, college education, disability*, and death.

HOW CAN I DO THIS?

We will start with a discussion of your present situation, your goals and objectives and the financial and insurance products you are already using. Then we will look at any other financial and/or insurance products that are available which would fit your situation.

WHAT ARE MY QUALIFICATIONS?

- Experienced * 33 Years in retirement, estate and financial planning.
- Knowledgeable * B.Sc. in Business Administration, University of Nebraska, 1973
* CLU (Chartered Life Underwriter) from American College, 1982
* ChFC (Chartered Financial Consultant) from American College, 1984
* Advanced Estate and Charitable Planning Course.
* Registered Representative for NYLIFE Securities Inc., (member NASD/SIPC)
Agent, New York Life Insurance Company
One Valmont Plaza, Omaha, NE 68154 (402) 496-6400
* Financial Adviser representing Eagle Strategies Corp.,
A Registered Investment Adviser
- Successful * Selected "Agent of the Year" By the National Association of
Insurance and Financial Advisors (NAIFA) 2001.
* Life Member of the Million Dollar Round Table**
* Member of the Omaha Estate Planning Council
* Past President of NAIFA
* NYL Chairman's Council Qualifier
* National Committeeman for NAIFA
* Appointed Federal Senate Coordinator by NAIFA
- Honest, Providing Good Service
- * National Quality Award Recipient – 25 Years
 - * National Sales Achievement Award – 25 Years
 - * Centurion Award - 25 Years

MY PLEDGE TO MY CLIENTS

I will make only those recommendations to my clients which I would follow myself if I were in the same situation as my client.

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*Products available through one or more carriers not affiliated with New York Life, dependent on carrier authorization and product availability in your state or locality

**MDRT is recognized throughout the industry as the standard of excellence in life insurance sales performance.