



Rodney Boelter, ChFC®, RICP®, CPFA®

Financial Planner

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- The American College of Financial Services®
  - Chartered Financial Consultant® (ChFC®) Designee
  - Retirement Income Certified Professional® (RICP®) Designee
- National Association of Plan Administrators (NAPA)
  - Certified Plan Fiduciary Advisor® (CPFA®) Designee
- Wharton School of Business at the University of Pennsylvania
  - Retirement Planning Program
- Kaplan University
  - Financial Planning Certificate
- Series 6, 7, 24, 63, and 65 Securities Registrations
- Life and Variable Life Insurance licensed in multiple states
- Bachelor of Science, Computer Information Systems
- Veteran, Military Intelligence Segment of the U.S. Army® Reserves



We all have financial goals we want to accomplish and we worry about making mistakes. With the jungle of different choices and options out there, it's easy to get confused and a little frightened. You need a guide you can trust to help navigate past any questions you may have and help point you in the right direction to help you prepare for the future.

As your guide, I work with you to develop a plan to help alleviate your concerns so you can pursue your financial goals. In the end, it is my hope that you will have a feeling of relief and accomplishment knowing you have made plans to prepare for your financial future. By understanding what is important to you, and why, I will help build a plan made for you; one that is custom and not off the rack.

To help you navigate through the financial jungle, I'm your guide.

**Areas of focus include:**

**Financial Position Analysis**

- Cash reserve strategies
- Debt management
- Cash flow management
- Net worth analysis

**Investment Planning**

- Asset allocation modeling
- Risk tolerance
- Education planning strategies
- Diversification strategies

**Preservation Planning**

- Life insurance planning
- Disability income insurance
- Long-term care insurance
- Business succession planning

**Tax Planning Strategies**

- Business ownership
- Non-qualified investment planning
- Tax reduction strategies
- Tax deferral methods

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