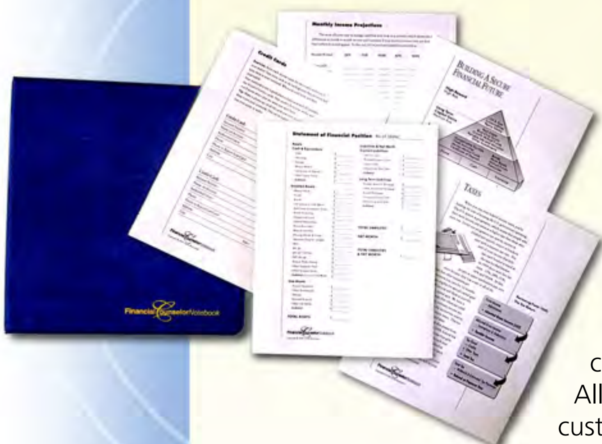
Offer your customers a way to make smarter financial decisions.



The Financial Counselor Notebook is the cornerstone of a complete financial services marketing plan.

This easy-to-use notebook contains nearly **50 pages of forms, worksheets, goal setting ideas, tax and credit card information, and step-by-step instructions** that bring clarity and insight to your customer's financial decisions. All notebooks can be customized for your organization.

Designed for Credit Unions and their Service Organizations.

This NASD-reviewed financial tool is also ideal for financial planners, broker dealers, banks, CPA firms and other groups who wish to increase the value of their financial services.

Professionally designed marketing materials are available to support each step of your success.

FCN's quick-loading, interactive website supports your marketing efforts, educates your customers and builds brand loyalty.

Colorful Point-of-Purchase displays insure a high level of customer interest. This program practically sells itself!

Learn more about how **The Financial Counselor Notebook** can help you and your customers win "The Money Game" and enjoy a bright financial future.

Toll Free:
1-800-729-6344

FinancialCounselorNotebook™

FinancialCounselorNotebook.com

Is it time for your annual financial tune-up?

Melissa Shaw is a Certified Financial Planner specializing in financial counseling. She is the author of the **Financial Counselor Notebook**, a personal financial organizer that helps couples take control of their finances.

During her 40 year financial services career, Melissa has accumulated extensive insurance and investment knowledge. Together with her husband and business partner, Douglas Jones, CLU, ChFC, she works to provide her clients with financial knowledge, perspective and assistance in a safe and comfortable environment.

Is your financial house in order? Melissa Shaw, CFP® will work with you to develop your own custom Financial Counselor Notebook. She performs this service during a three hour interview in her Lake Forest office. She will help you prioritize and organize your financial affairs, review your goals and objectives, suggest ways to improve your cash flow, and address important net worth and retirement issues.

The financial confidence you receive from having a clear financial picture is priceless. Call and schedule your financial tune-up today.

Your financial counseling session with Melissa Shaw, CFP includes a ***Financial Counselor Notebook*** *customized especially for you. The Financial Counselor Notebook contains nearly 50 pages of forms, worksheets, goal-setting ideas, tax and credit card information, and step-by-step instructions that bring clarity and insight to your financial decisions.*

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Take Control of Your Finances

with the
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Use the tool professional financial planners use. Delivered to you in a personal, easy-to-use financial organizer.

- **Bring insight and clarity** to difficult financial decisions with over 50 pages of forms, worksheets, goal setting ideas, tax and credit card information, and step-by-step instructions.
- **Organize and share** information between spouses.
- **Helpful in case of an emergency.** If the house is on fire, grab your Financial Counselor Notebook on your way out. If there is a tragedy that involves a disability or death, you retain vital information.

The financial confidence you receive from having a clear financial picture is priceless. Call and schedule your financial tune-up today.

Melissa Shaw, Planner

CFP® Certified Financial Planner™ professional
Accent Insurance Brokerage

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Your name, contact and disclosure information here

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Do you run your business as well as you run your practice?

How is your business structured?

- Corporation
- Partnership
- Sole Proprietor

Your well-managed business will turn cash flow into Personal Net Worth. Your complete business and financial team should include an Accountant, Pension Advisor, Investment Advisor, an Attorney and a Financial Planner.

Is your financial house in order? Melissa Shaw, a CERTIFIED FINANCIAL PLANNER® professional who specializes in financial counseling for dental professionals, will work with you to develop your own custom financial plan. She will help:

- Prioritize and organize your financial affairs
- Review your goals and objectives
- Suggest ways to improve your cash flow
- Address important net worth and retirement issues

Melissa also helps couples communicate about money. Marriages and families go through changes and grow together. A family financial advisor will teach you how to make better financial decisions and help make your dreams come true. ***The financial confidence you receive from having a clear financial picture is priceless. Call or email Melissa today to schedule your financial tune-up.***

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Melissa Shaw, CFP®
CERTIFIED FINANCIAL PLANNER®
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Specialized Financial Planning for Business Owners

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CERTIFIED FINANCIAL PLANNER®
professional

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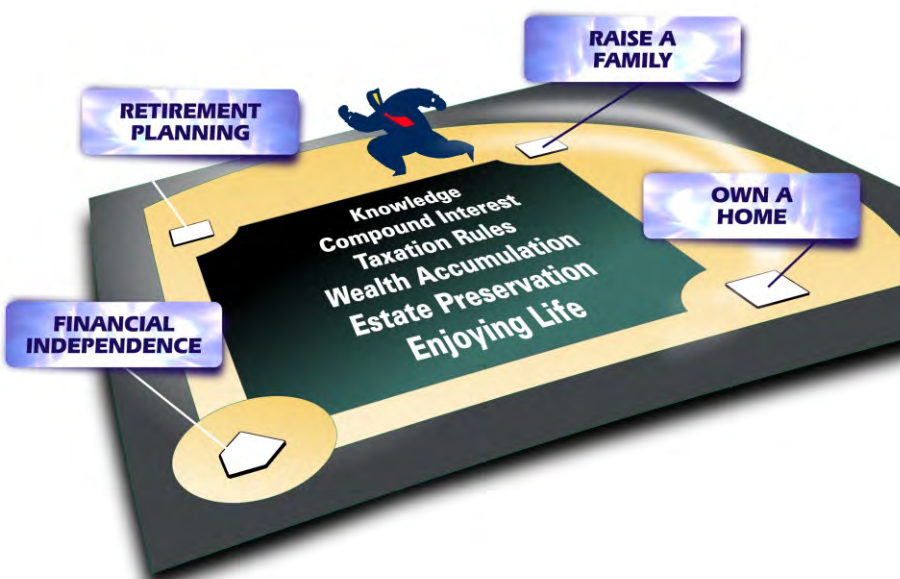
INVESTING

Is it time for your annual Financial Tune-up?

Let the **Financial Counselor Notebook** process help you feel better about your finances.

Your Personal Financial Organizer will bring knowledge, direction and focus to your financial life. **Get yours today.**

Need more help? Please speak with one of our counselors.



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