

How We Work Together: Helping You Reach Your Financial Goals

When it comes to investing, what do you value? A strategy designed for your situation? A financial advisor who truly understands you and what you're trying to achieve, and will partner with you over the long term to help keep you on track? What about disciplined, objective guidance?

When we work together, you get all of that and more. I'll work with you to create personalized financial strategies to help you reach your goals. I do this by:

1 Understanding what's important to you

Your strategy should be personalized. So before I make a recommendation, we'll first work closely together to understand what is most important to you, including your goals, comfort with risk and how you'd prefer to work together.

2 Using an established process to build your personalized financial strategies

I use an established 5-step Process, incorporating what's important to you, to develop a personalized strategy using our advice, guidance and advanced tools. This process gives us the framework to get you to where you want to be.

3 Partnering together over time to help keep you on track

Markets, interest rates and life's priorities may change, but our relationship and my commitment to helping you achieve your goals won't. I'll make sure I'm with you every step of the way by:

- Providing regular reviews and updates
- Identifying timely risks and opportunities
- Helping you keep your emotions in check during market volatility
- Helping you prepare for the unexpected

My mission is to help you achieve what's most important to you. That means delivering value where you need it most, using our established process to build your personalized strategies, and helping you stay on track by partnering together over the long term.



Joe Allen

Financial Advisor

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It Takes a Team

As a client, you work closely with me and the team at my office – but we're not alone. We enjoy the support of a team of investment professionals and strategists in our home office, all dedicated to developing the advice and guidance designed to help you reach your goals.

I'll also work in partnership with the other key members of your team – such as your CPA or attorney, as needed – to help you stay on track.

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Edward Jones[®]
MAKING SENSE OF INVESTING



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Branch Team

Ayla Dushane
Branch Office Administrator

Work History

Edward Jones
December 2018 - Present

Wells Fargo
July 2007 - December 2018

Education

Keller Grad Sch of Management
Masters

Before my wife, Wendy, and I got married, we were both incredibly passionate about making sure we were on a strong financial foundation with a plan to reach our financial goals. We planned on having kids and wanted to make sure we provided a stable financial environment. So, when I was fresh out of college and entering my career in information technology, I enlisted the help of a financial advisor.

After many years in IT, adding two sons to our family and having achieved the financial foundation I desired (thanks to the help of my financial advisor), I realized I wanted to do something more meaningful. Along the way, I had the opportunity to help a family member retire with dignity. It was in those few one-on-one sessions that I realized I wanted to help people achieve their financial goals.

Investor education is important to me. I host:

- Monthly educational lunches, dinners or seminars on various topics
- Monthly coffee club discussing current events, investing and the economy in a relaxed, informal setting

I'm not only passionate about finances but also serving in our community.

- I serve as vice president of the board of directors for The Launch Pad Teen Center (a local Non-Profit)
- I volunteer my time as a youth sports coach year-round
- I was a Big Brother for 12 years until my "little" turned 18
- I'm a member of Senior Connection here in the Quad Cities

Whether you're planning for retirement, in retirement, saving for college for children or grandchildren, or just trying to protect the financial future of the ones you care for the most, we can work together to develop specific strategies to help you achieve your goals. We will work together throughout your life with your attorney, accountant and other trusted professionals, to help ensure you are always on track to reach those goals. Throughout it all, I'm dedicated to providing you with the level of service I provide my family members.

Call and schedule an appointment today!