

SALES, **MARKETING**, ADVANCED CASE DESIGN



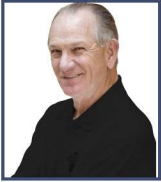
Alan Lockhart
President & CEO
alan@marketingfinancial.com

Advanced Case Design, Life, Annuity,
LTC



Ellen MacKenzie
Regional Vice President
ellen@marketingfinancial.com

Life Case Design, Impaired Risk,
Annuity, LTC, Disability



Jim Young
Regional Vice President
jim@marketingfinancial.com

Life and Sales Marketing



Caleb Smith
Internal Sales Support
caleb@marketingfinancial.com

Annuity & Income Support

Target Markets

- Banks & Credit Unions
 - Broker Dealers
 - Business Owners
 - Independent Agents
 - CPA Program
- Health & Group Agencies



SUPPORT TEAM



Kelly McDonnell
New Business Manager
kelly@marketingfinancial.com

Life & Long Term Care
New Business Underwriting



Cindy Peters
New Business Manager
cindy@marketingfinancial.com

Life & Long Term Care
New Business Underwriting



Kristi Phillips
Contracting Manager
kristi@marketingfinancial.com

Agent Contracting &
Licensing



Ariel Corley
New Business Manager
ariel@marketingfinancial.com

Annuity
New Business Underwriting



Emily Smith
Communications Coordinator
Emily@marketingfinancial.com

Communications &
Marketing

Products

- Annuities
- Disability Income
- Life Insurance
- Long Term Care



Contact Us

417-831-4431 • 800-677-1087

F:417-831-1087

www.marketingfinancial.com

2960 E. Battlefield Rd.
Springfield, MO 65804

Specialized Planning Tools

- Annuity Division: Fixed, Indexed & Income
- Life Division: Term, WL, UL, IUL, & VUL
- InForce Opportunities Division
- LTC & Disability Income Insurance
- Impaired Risk Underwriting
- Tax Deductions for Business Owners
- Tax-Free Retirement Income Planning
- "Be Your Own Bank" Savigs Strategy

