

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
- Business Owners
- Independent Agents
- CPA Program
- Health & Group Agencies



SUPPORT **TEAM**

**Kelly McDonnell**

New Business Manager
Kelly@marketingfinancial.com

Life & LTC, New Business Underwriting

**Cindy Peters**

New Business Manager
Cindy@marketingfinancial.com

Life & LTC, New Business Underwriting

**Amy Gomme**

Contracting Manager
Amy@marketingfinancial.com

Agent Contracting & Licensing

**Ariel Corley**

New Business Manager
Ariel@marketingfinancial.com

Annuity, New Business Underwriting

**Vincent Nolden**

Communications Coordinator
Vincent@marketingfinancial.com

Communications and Marketing



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" Savings Strategy