

BLUEPRINT NOTEBOOK

2025 FALL FINANCIAL ADVISER CONFERENCE

SEPTEMBER 17-19, 2025



CFD COMPANIES



TABLE OF CONTENTS

01	TABLE OF CONTENTS	01.1 / Table of Contents	02
		01.2 / Our Mission	03
		01.3 / Welcome	04
02	CONFERENCE AGENDA	02.1 / Agenda Day One	05
		02.2 / Agenda Day Two	06
		02.3 / Agenda Day Three	07
03	HONORS & HIGHLIGHTS	03.1 / Our Corporate Sponsors	08
		03.2 / Presidential Adviser Trip	09
		03.3 / Emerging Adviser Trip	10
		03.4 / The CFD Companies	11
		03.5 / Hotel Information	12
04	PRESENTATIONS	04.1 / Home Office Presentations	14
		04.2 / Liz Bohannon , Keynote Speaker	16
		04.3 / Team CFD Meeting	17
		04.4 / Brent Owens , Look Ahead to 2026	18
		04.5 / Benham Brothers , Keynote Speakers	19
		04.6 / Platinum & Gold Sponsor Presentations	20
		04.7 / Matthew Bahrenburg , Compliance Meeting	21
		04.8 / Adviser Presentations	22
		04.9 / Super CE Event	24
05	OUR VISION	05.1 / Having a Vision	25
06	CONTACT	06.1 / Registered Advisers	26
		06.2 / Home Office Contact Sheet	30



OUR MISSION

cfid Investments is a Broker/Dealer dedicated to providing Financial Advisers with the necessary support, tools, techniques, quality financial products, and technologies for the achievement of their clients' goals and objectives through a team of home office personnel committed to serving advisers in a Christ-like manner, believing you cannot push someone to the top of the mountain without getting there yourself.

BLUEPRINT

WELCOME

Office of the President

Dear Valued Financial Advisers,

The timing of this letter is one of the most difficult periods that we have gone through as a firm. Within the last week, we have lost 38-year-old Brett Bacon. Brett lived life to the fullest. He adored his wife, Brittany, and his five daughters. His passing has been rough on many people across the country. So, why do I bring this up as a part of my Welcome Letter to the 2025 Fall Financial Adviser Conference? Sometimes we attend conferences to check off boxes. Let's take care of Compliance – Check. Let's take care of Super CE – Check. Let's take care of you name it – Check. As I grow older, I am starting to see conferences as something even more profound than just checking off another box. I see OUR conferences as a way to interact and engage with people that WE care about and love. It has been mentioned to me many times by many Financial Advisers on how much it means to you when you see us address you as, "VALUED". You all are VALUED! We do not take any of you for granted, and in light of what we are going through now as a firm, let's capture the essence of FAMILY as much as we can these next three days. I look forward to spending time with you on the Pickleball Court, Golf Course, Dinners, Lunches, Prayer Breakfast, in between sessions, etc. Don't let this moment pass without engaging with one another, because tomorrow is not promised. Seize the day!

In my opinion, we have put together another amazing agenda. You will not only hear from Presidential Adviser Qualifiers, but now you will also hear from some of our up and coming Emerging Advisers. This mix of seasoned veterans and hungry younger advisers is exciting. CFD is not only experiencing this among the young and old at the Adviser Level, but we are experiencing it at the Home Office Level as well. We are at a very unique time in the history of the CFD Companies. It has only been two years since our Founder and my Father, Mick Owens, semi-retired. I am starting to see my runway get shorter, as next year will be my 35th year with the firm. Mentally, I still feel like I am a kid, but the reality is, I am closer to the finish than the start. Therefore, it is imperative that the CFD Companies are focused on things such as the Adviser Transition Program, Emerging Advisers, and Home Office Leadership Training for the Next Generation. I want you to all know that we are hyper-focused on taking this unique, boutique firm to the Next Generation of Financial Advisers and Home Office Team Members!

Our theme is BLUEPRINT. Even though OUR firm is over 35 years old, we are still experiencing 20%+ growth, because of the quality Financial Advisers that are with the CFD Family. We have now doubled the size of the gym to increase engagement during the conference time. We have added 15 new offices to expand our employee base. There is an excitement in the air knowing that the Best is Yet to Come. Take advantage of the sessions. Take advantage of the fellowship. Let's have something beyond a Conference that just checks off boxes. Let's have a Family Reunion that will impact us all as a group for years to come!

I love you all. Thanks for being here and thanks for being a VALUED member of the CFD Family.



WEDNESDAY

SEPTEMBER 17TH

12:00PM to 1:00PM

Café

LUNCH WITH WHOLESALERS

Boxed Lunches

1:00PM to 1:45PM

Auditorium

ADVISER TRANSITION PROGRAM

with Maria Barnes



1:45PM to 2:30PM

Auditorium

2025 & 2026 TAX UPDATES

with Greg Smith



2:30PM to 3:15PM

Auditorium

SYCAMORE COMMISSION UPDATES

with Michael Grady



3:15PM to 4:00PM

Auditorium

MONEY MANAGEMENT UPDATES

with Kregg Rooze



4:00PM to 5:00PM

Auditorium

KEYNOTE SPEAKER: LIZ BOHANNON

Liz Bohannon is a top 1% VC-backed founder, workplace connection expert, and bestselling author who helps organizations thrive through connection, collaboration, and fulfillment. As a successful entrepreneur and speaker, she brings proven frameworks that empower teams to go further, together—by prioritizing human relationships and meaningful community.



6:00PM to 8:00PM

Various locations

CORPORATE SPONSOR DINE AROUND KOKOMO

Join your fellow advisers and our corporate sponsors for an evening of networking and good conversation at some of Kokomo's top rated dining experiences like Marble the Steakhouse, Hacienda, Pastarrific, and more. Please be sure to select your dinner option during registration as space is limited. We look forward to dining with you!



THURSDAY

SEPTEMBER 18TH

8:00AM to 8:30AM

Café

BREAKFAST & REGISTRATION

8:30AM to 9:45AM

Auditorium

TEAM CFD MEETING

9:45AM to 11:00AM

Auditorium

LOOK AHEAD TO 2026

with Brent Owens



11:00AM to 12:00PM

Auditorium

KEYNOTE SPEAKER: BENHAM BROTHERS

David and Jason Benham are identical twins, former pro baseball players, and serial entrepreneurs whose businesses have gained national acclaim and expanded globally. After HGTV canceled their show Flip It Forward due to their traditional values, they became prominent voices in faith-based leadership and philanthropy. Through the Benham Companies and their nonprofit work, they inspire others with a focus on purpose, integrity, and impact.



12:00PM to 1:30PM

Café

LUNCH WITH WHOLESALERS

Lunch provided by Mitchell's Mexican Grill

12:00PM to 12:30PM

Auditorium

ADM ANNUAL MEETING

Only rep as PM needs to attend

1:30PM to 3:15PM

Auditorium

PLATINUM & GOLD SPONSOR PRESENTATIONS

3:15PM to 5:15PM

Auditorium

ANNUAL COMPLIANCE MEETING

6:00PM to 8:00PM

Legacy Barn

FALL CONFERENCE DINNER

Legacy Barn

951 County Rd N 600 W, Kokomo, IN 46901

Dinner provided by Angry Donkey



FRIDAY

SEPTEMBER 19TH

7:15AM to 8:45AM

Café

PRAYER BREAKFAST

Sponsored by Timothy Plan, Eventide, Inspire, Praxis Funds, and Guidestone Funds

8:45AM to 9:30AM

Auditorium

TAX PLANNING 101 WITH HOLISTIPLAN

with Nathan Cruz



9:30AM to 10:15AM

Auditorium

SETTING UP YOUR OWN PENSION PLAN FOR THE SMALL ADVISER

with Kent LaLonde



10:15AM to 11:00AM

Auditorium

THE DYNAMIC BUCKET APPROACH

with Edward Camp



11:00AM to 12:00PM

Auditorium

UNLOCKING ADVISER GROWTH ON SOCIAL MEDIA

with Rachael Camp



12:00PM to 1:30PM

Café

LUNCH WITH WHOLESALERS

Boxed Lunches

THIS CONCLUDES THE 2025 FALL FINANCIAL ADVISER CONFERENCE

Please feel free to depart at your leisure. Thank you for your attendance!

1:30PM to 1:40PM

Auditorium

SUPER CE SPONSOR

with Jackson

**SUPER CE
EVENT**

Earn Life & Health, CFP, IAR, IWI, and CFFP CE credits at no cost by registering through the 2025 *Blueprint* Fall Conference link.

Complete your CE test at the home office to have credits automatically added to your transcripts for license renewal. Don't miss your chance to earn this valuable information during this exclusive opportunity!

1:40PM to 1:50PM

Auditorium

SUPER CE SPONSOR

with Corebridge

1:50PM to 2:00PM

Auditorium

SUPER CE SPONSOR

with Nationwide/Annexus

2:00PM to 3:00PM

Auditorium

SUPER CE SESSION

Your opportunity to earn CE credits!

CORPORATE SPONSORS

THANK YOU TO OUR SPONSORS

PLATINUM



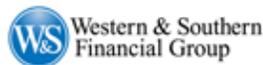
GOLD



SILVER



BRONZE



20 PAT 25

Turks & Caicos

◀ THE RITZ-CARLTON ▶



CFD COMPANIES



Kurt Supe



Chris Rockey



Jim Guyot



Alex Lebron



Edward Camp



Rick Bain



Bill Clark



Brett Bacon



Kent LaLonde



Stuart Breeden



James Martin



Orrie Augsburger



Jeff Larimore



Rich D'Ambola



Dan Ballister



Brent Owens



Daryl Phillips



Benjamin Franklin



Daniel Hoelscher



Aric Carpenter



Tim Kling



John Culpepper



Brian Quick



Mike Dusold



Terry May



Eric Grzegorski



Otto Ray



Peter Passalacqua



Lee Grossman



Standish Fortin



Lisa Raderstorf



Tom Beachy

EMERGING ADVISER TRIP

2025

HUNTINGTON BEACH, CALIFORNIA



STEVEN CARPENTER



NATHAN CRUZ



RACHAEL CAMP



MATT HOLT



TIM FRANKLIN



RYAN DEAMICIS



KEVIN DUSOLD



TRENT MAY



KYLE MARBURGER



SAEED SULAIMAN



NOLAN DILL



JARED HOUSEMAN



JIMMY GAONA



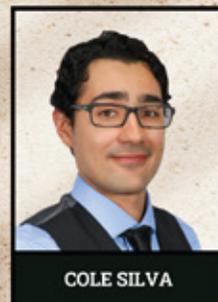
JEREMY BRADEN



ADAM SHELTON



ANDREW DRUFKE



COLE SILVA

HYATT REGENCY BEACH RESORT & SPA





CFD COMPANIES

CFD INVESTMENTS

CREATIVE FINANCIAL DESIGNS



CFD INSURANCE PLANNERS

CFD INSURANCE

CFD BANKING SERVICES

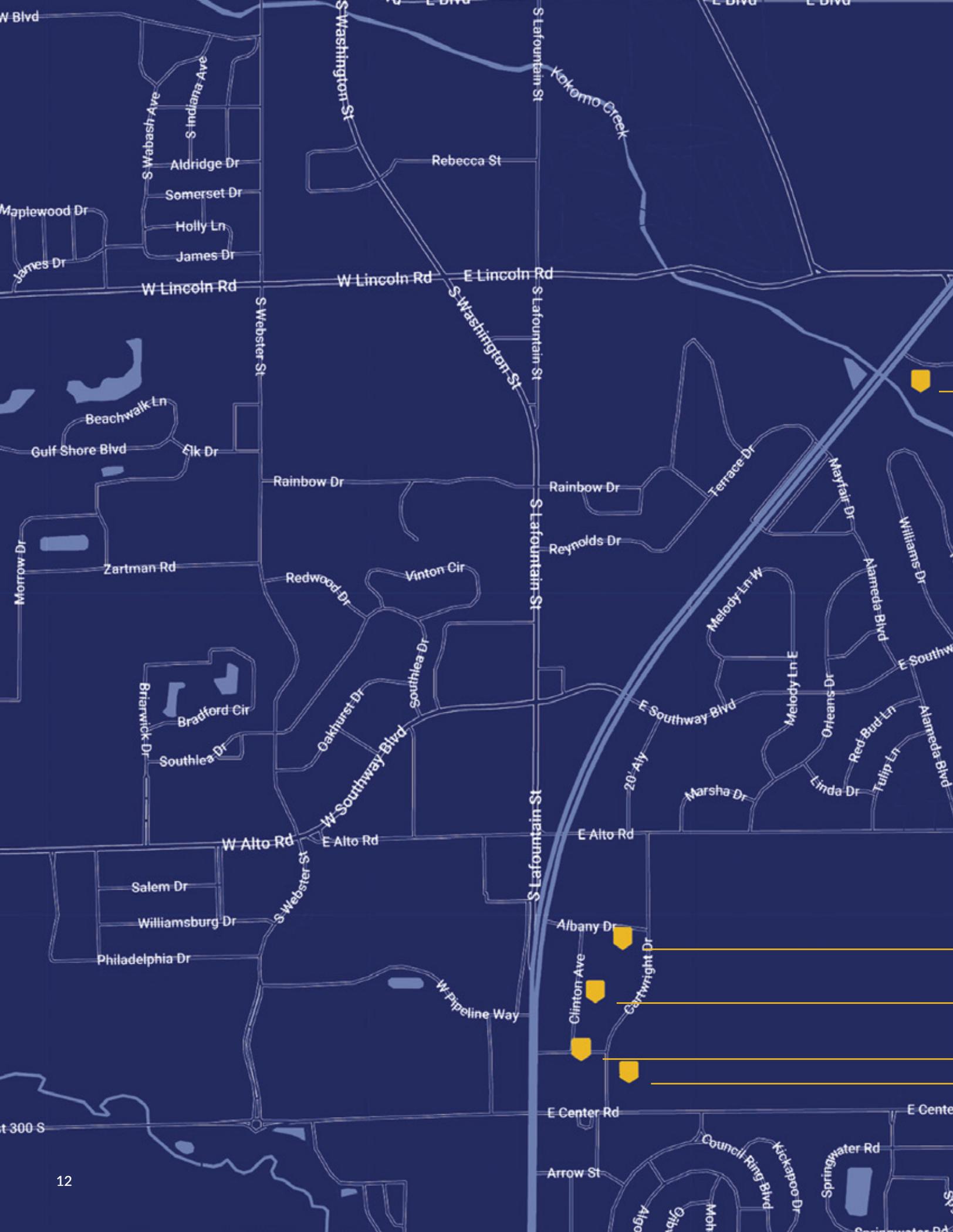


CFD TAX PREPARATION

ALTER & ROCKEY

CFD REALTY





BLUE PRINT

Fall Financial Adviser Conference 2025

CFD Conference Blocks

Hampton Inn & Suites: 765.455.2900

Courtyard by Marriott: 765.453.0800

Holiday Inn Express & Suites:
765.450.8085

*Home2 Suites: 765.319.1300

Fairfield Inn & Suites: 765.926.3100

Other Kokomo, IN Hotels

Super 8 by Wyndham: 765.252.1938

La Quinta Inn & Suites: 765.453.2222

Days Inn & Suites by Wyndham:
765.450.9766

Best Western: 765.453.8822

Baymont by Wyndham: 765.416.6570

Comfort Inn: 765.252.4818

Motel 6: 765.450.6630

Fall Conference Dinner

Legacy Barn: 765.438.7269

* New Hotels

HOME OFFICE SPEAKERS

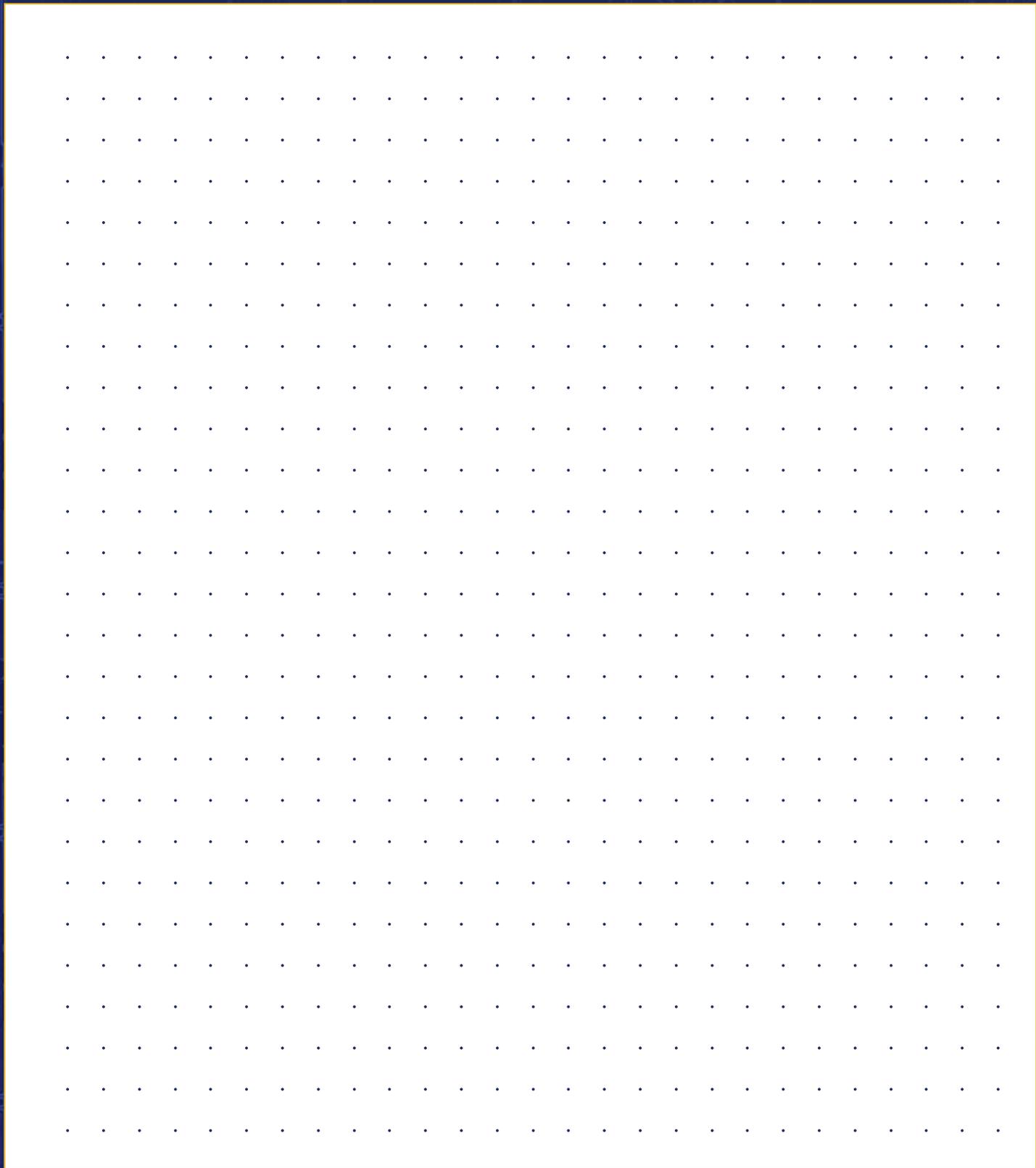
Wednesday, September 17th



1:00PM to 1:45PM
Adviser Transition Program
MARIA BARNES



1:45PM to 2:30PM
2025 & 2026 Tax Updates
GREG SMITH



HOME OFFICE SPEAKERS

Wednesday, September 17th



2:30PM to 3:15PM

Sycamore Commission Updates

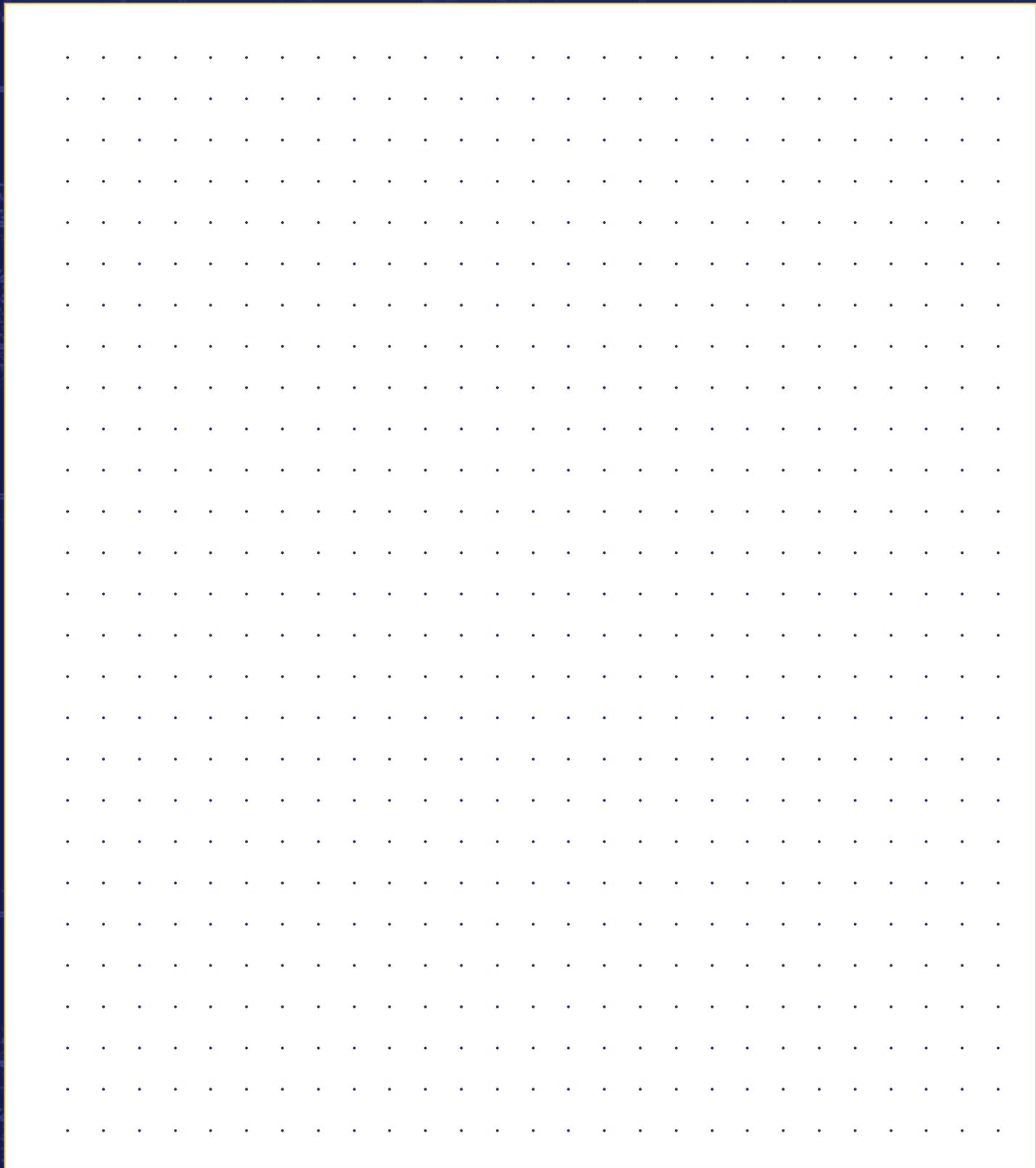
MICHAEL GRADY



3:15PM to 4:00PM

Money Management Updates

KREGG ROOZE



Wednesday, September 17th

4:00PM to 5:00PM

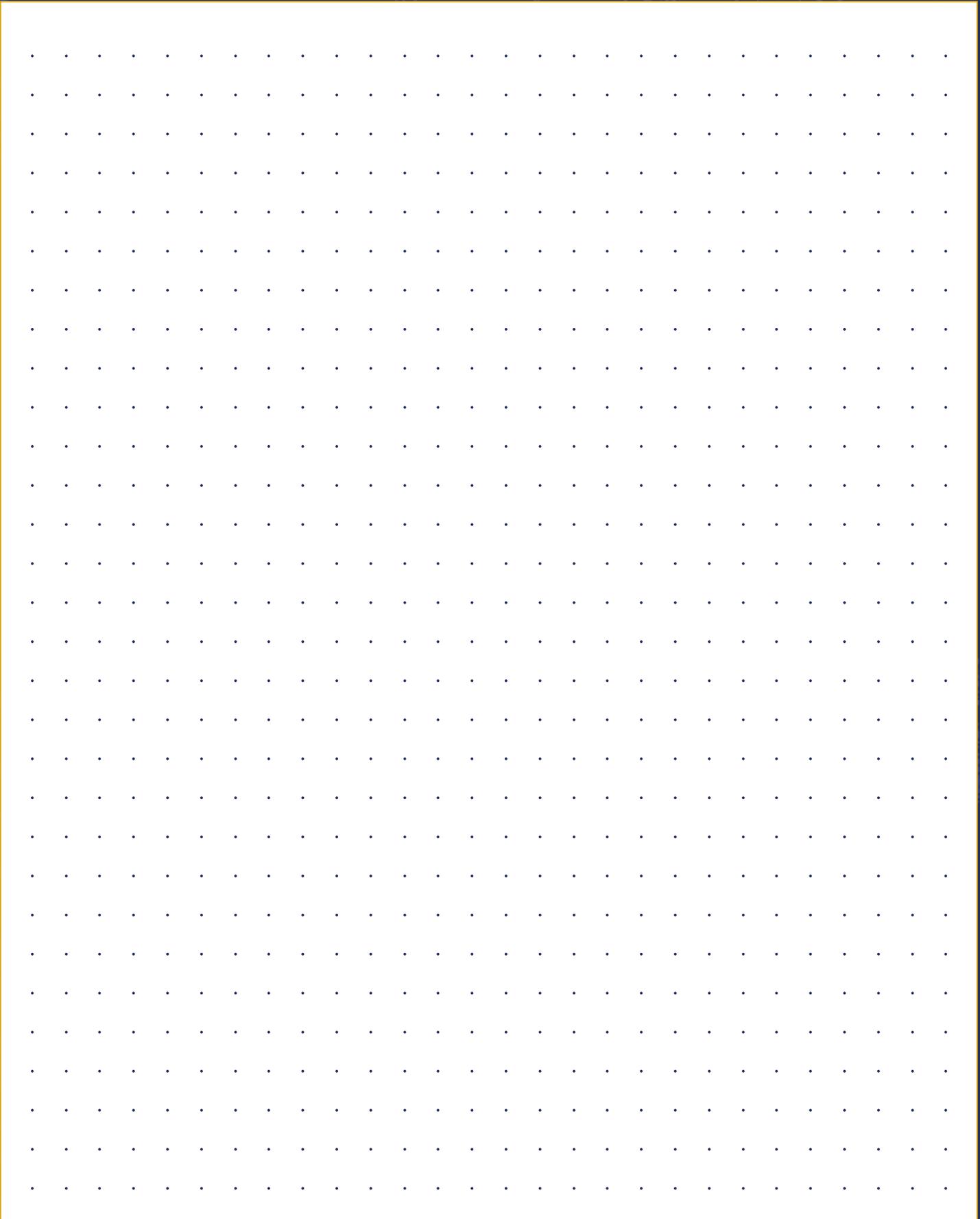


Keynote Speaker
LIZ BOHANNON

<p>A large grid of 20 columns and 30 rows of small black dots, intended for handwritten notes.</p>
--

TEAM CFD MEETING

Thursday, September 18th, 8:30AM to 9:45AM



Thursday, September 18th

9:45AM to 11:00AM



Look Ahead to 2026

BRENT OWENS

A large white rectangular area with a light blue dot grid pattern, intended for handwritten notes or a presentation.

MOLLOY AEN | DNLS18C

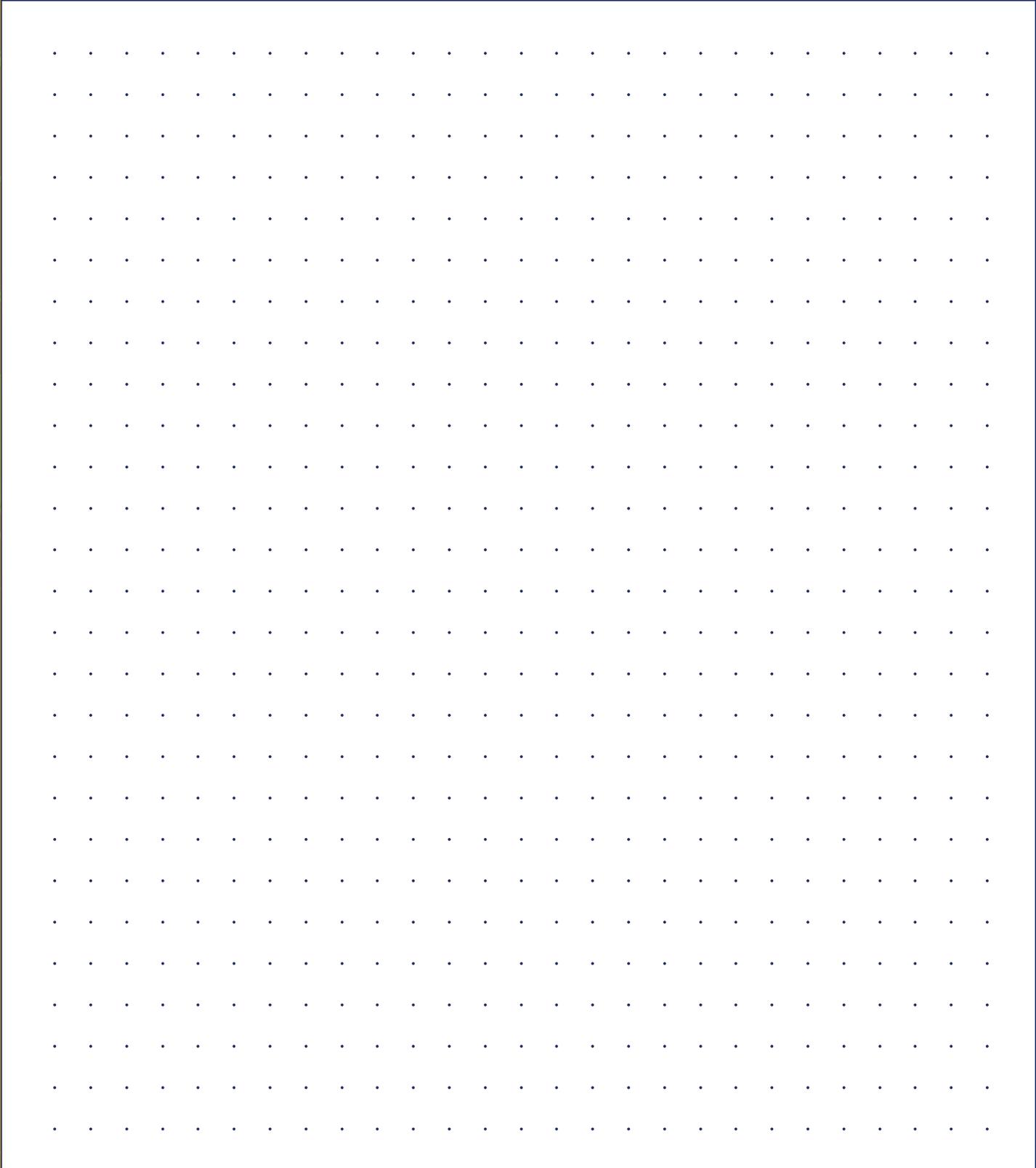
M
MECH (119)
OFFICE (119)
HALLWAY
OFFICE
W

Thursday, September 18th

11:00AM to 12:00PM



Keynote Speakers
BENHAM BROTHERS



2 HOUR FIRE RATED
FIREWALL

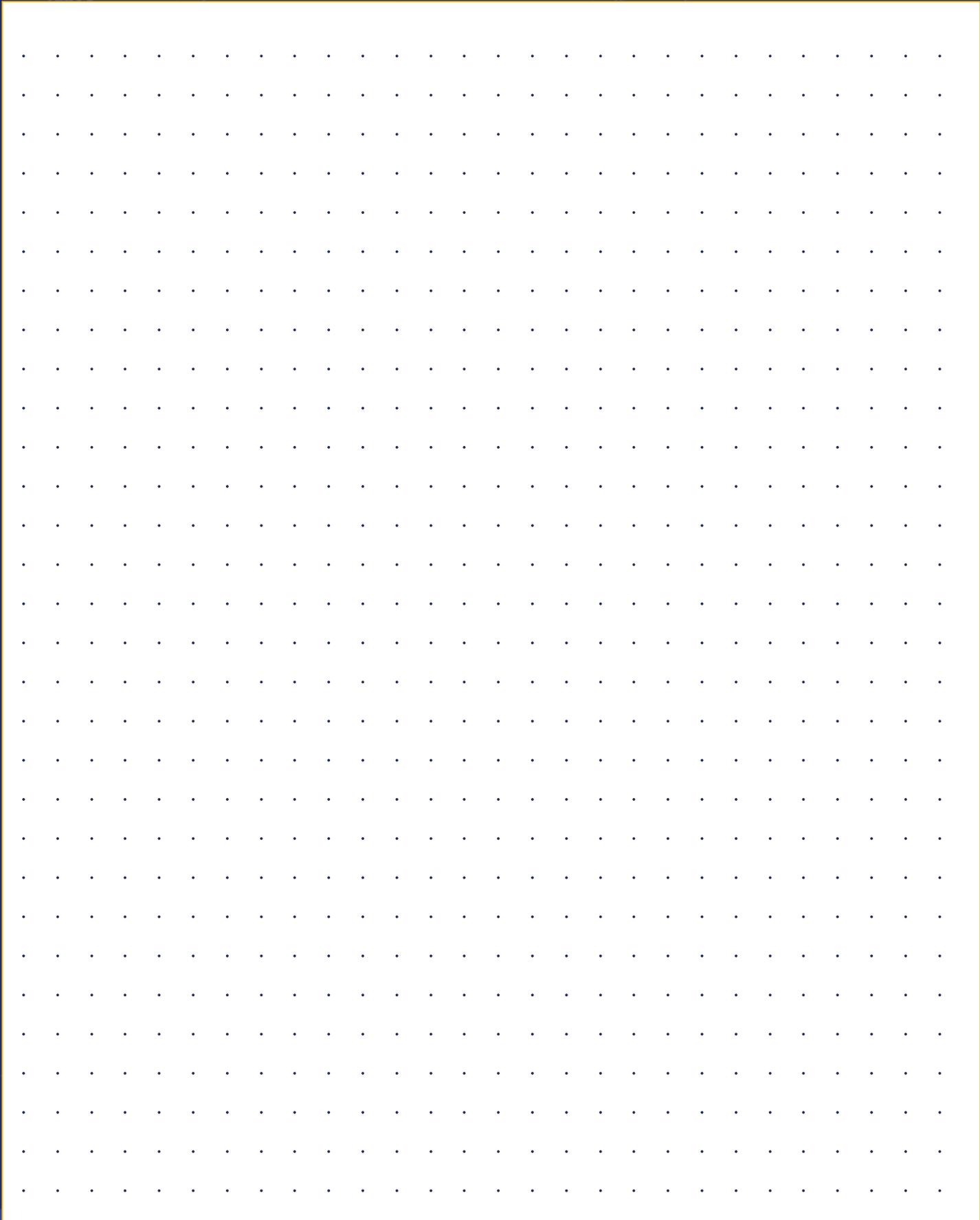
D

PLATINUM & GOLD SPONSOR TALKS

Thursday, September 18th, 1:30PM to 3:15PM

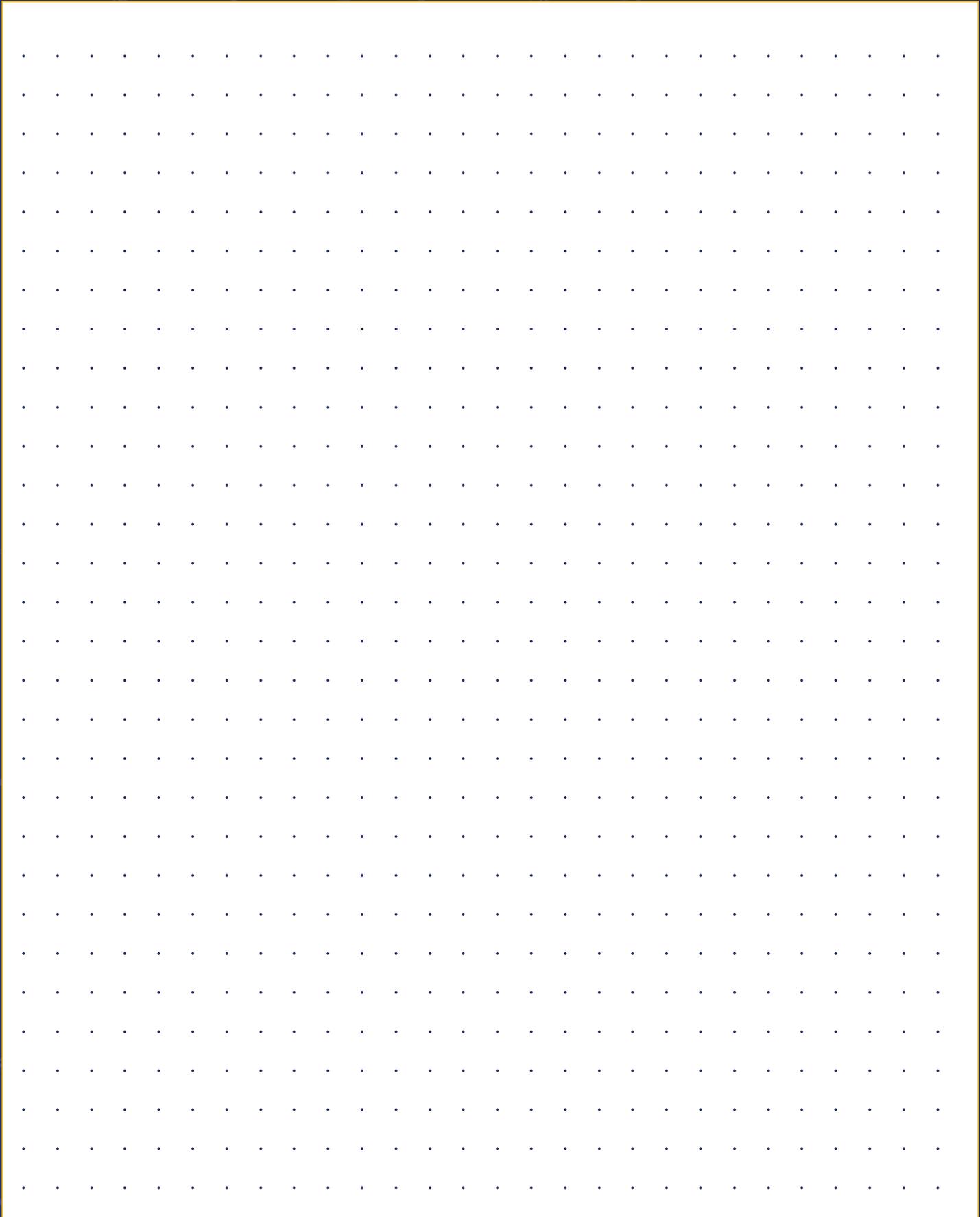
EXISTING

EXISTING



ANNUAL COMPLIANCE MEETING

Thursday, September 18th, 3:15PM to 5:15PM



ADVISER SPEAKERS

Friday, September 19th



8:45AM to 9:30AM

Tax Planning 101 with Holistiplan

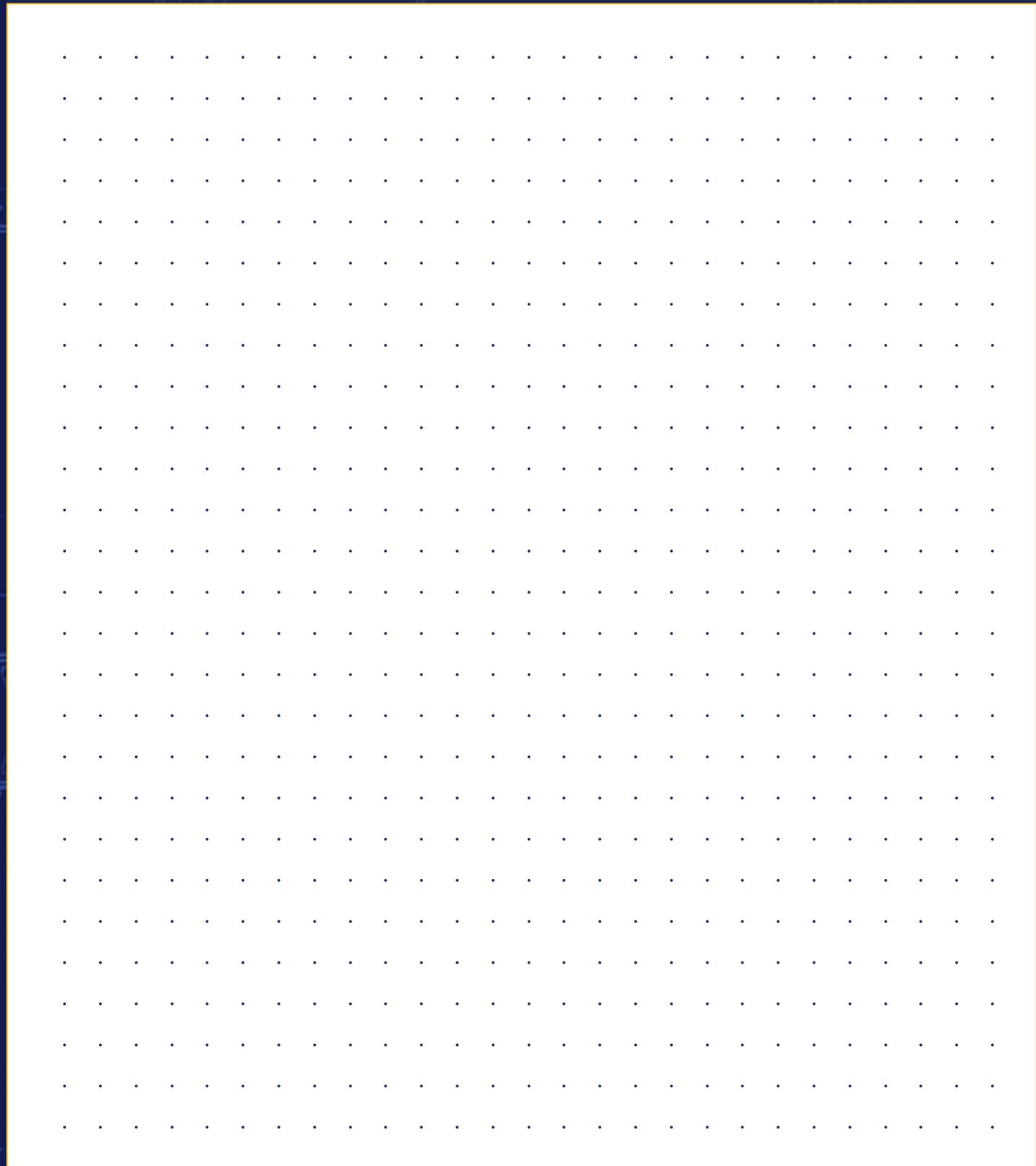
NATHAN CRUZ



9:30AM to 10:15AM

Setting Up Your Own Pension Plan for the Small Adviser

KENT LALONDE



ADVISER SPEAKERS

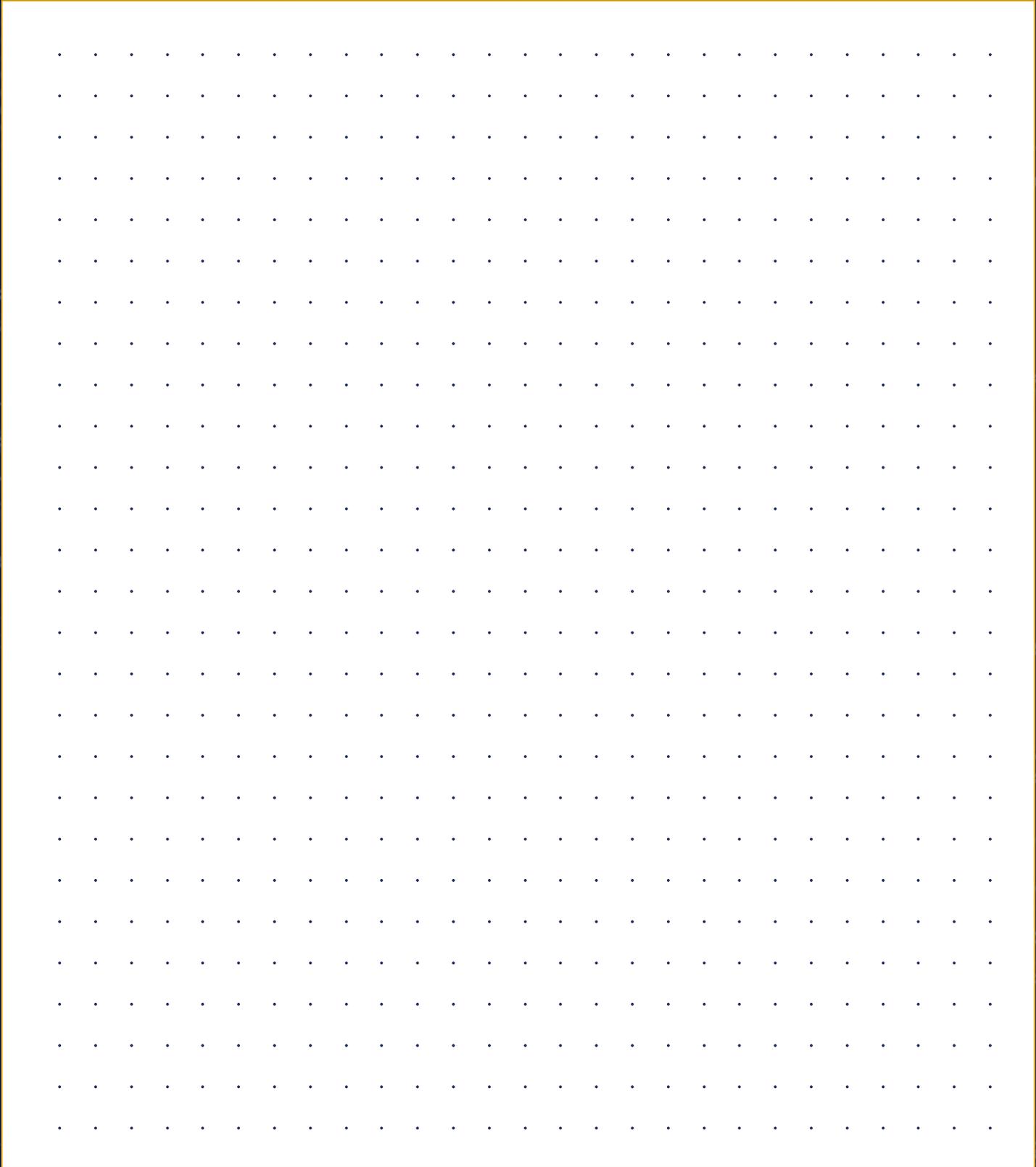
Friday, September 19th



10:15AM to 11:00AM
The Dynamic Bucket Approach
EDWARD CAMP



11:00AM to 12:00PM
Unlocking Adviser Growth on Social Media
RACHAEL CAMP



SUPER CE EVENT

Friday, September 19th, 2:00PM to 3:00PM

A large grid of 20 columns and 30 rows of small dots on a white background, intended for a seating chart or event layout.

“WHERE THERE IS NO **VISION** THE PEOPLE PERISH.”

Proverbs 29:18

Having a VISION is not optional— it is an absolute necessity for survival! You must figure out your unique purpose in life and how you’re going to live out that purpose. Your VISION is simply how you want that PURPOSE to show up in the future. Our VISION is to impact as many people as possible with what we believe is the reality of Jesus Christ. We believe He is both Lord and Savior. We want to serve Him by serving you and helping you serve your clients. It’s not about making a bunch of money— It is all about making a difference in the lives of others!! We want to make a difference in people’s lives both now and for eternity.

Therefore, we challenge you to take relationships deeper. Help clients to figure out their purpose, power, personal self, other people, and performance fitness. What is their passion; what “fuel” will drive them; encourage physical, mental,

and spiritual health; encourage the development of interpersonal skills so that families stay together and individuals function as a functional part of community; challenge people to develop professional skills to perform at the necessary level to achieve their designed financial goals.

In short, wouldn’t it be grand if everyone you come into contact with carried out their unique purpose with passion fueled with Godly wisdom, were physically, mentally, and spiritually fit (going to heaven), living in harmony with their spouse, children, friends, co-workers, etc., and performing jobs that are financially rewarding and making a difference in the lives of others.

Don’t perish — get a VISION!!



REGISTERED ADVISERS

(Listed alphabetically by state)

ALABAMA

Chris Buxton

Auburn, AL
cbuxton@buxtoninvestments.com
(334) 610-7022

CALIFORNIA

Paul Betenbaugh

Orland, CA
paul@betenbaughfinancial.com
(530) 865-5165

Larry Chavez

Gilroy, CA
larry.chavez@christianwm.com
(408) 835-7140

Michael Graef

Gilroy, CA
michael@christianwm.com
(408) 782-7572

Kurt Hill

Bakersfield, CA
kurt.hill@cfdinvestments.com
(661) 204-9365

Kent LaLonde

San Clemente, CA
kent@blackmontadvisors.com
(949) 510-8561

Cole Silva

Gilroy, CA
cole@christianwm.com
(408) 782-7572

COLORADO

Rachael Camp

Denver, CO
rachael@rachaelcampwealth.com
(574) 904-3672

Andy Hackett

Colorado Springs, CO
andy.hackett@cfdinvestments.com
(719) 310-9560

FLORIDA

Mark Gray

Plant City, FL
mark.gray@cfdinvestments.com
(813) 763-0923

Marie Torres

Minneola, FL
marie.torres@cfdinvestments.com
(408) 728-1791

GEORGIA

Rusty Beasley

Lavonia, GA
rusty.beasley@cfdinvestments.com
(706) 356-4306

IDAHO

Ryan De Amicis

Boise, ID
ryan@christianwm.com
(408) 758-6413

Doug Hanson

Boise, ID
doug@christianwm.com
(208) 918-8655

Kevin Lewin

Nampa, ID
kevin@alliantfinancialsolutions.com
(208) 615-2340

Mark Schick

Boise, ID
mark@christianwm.com
(844) 800-1668

Joe Verissimo

Boise, ID
joe@christianwm.com
(844) 800-1668

ILLINOIS

Bryce Breeden

Peoria, IL
bryce.breeden@cfdinvestments.com
(309) 691-3654

Stuart Breeden

Peoria, IL
stuart.breeden@cfdinvestments.com
(309) 691-3654

Bob Diamond

Crete, IL
bob.diamond@cfdinvestments.com
(708) 995-7727

Ben Franklin

Urbana, IL
ben@franklinwa.com
(217) 337-7526

Tim Franklin

Urbana, IL
tim@franklinwa.com
(217) 337-7526

Jeff Lillie

Rockford, IL
jeffery@lrfinancial.com
(815) 877-4722

Rod Vaughn

Fairfield, IL
rod.vaughn@cfdinvestments.com
(618) 842-5211

INDIANA

Doug Atkins

Greenwood, IN
doug.atkins@cfdinvestments.com
(317) 215-4302

Jamie Barber

Kokomo, IN
jamie.barber@cfdinvestments.com
(765) 453-9600

Tom Beachy

Fort Wayne, IN
thomas.beachy@cfdinvestments.com
(260) 246-5450

Joanne Broadwater

Attica, IN
joanne.broadwater@cfdinvestments.com
(765) 762-6780

Richard Bryant

Carmel, IN
richard.bryant@cfdinvestments.com
(317) 629-1990

Edward Camp

Mishawaka, IN
edward.camp@cfdinvestments.com
(574) 273-0803

Rod Carroll

Kokomo, IN
rod.carroll@cfdinvestments.com
(765) 453-9600

Caleb Clark

Kokomo, IN
caleb@cfcadvisers.com
(765) 453-9600

Jeff Coffin

Bloomfield, IN
jeff.coffin@cfdinvestments.com
(812) 384-1020

John Culpepper

Indianapolis, IN
john.culpepper@cfdinvestments.com
(317) 788-1562

Andrew Drufke

Indianapolis, IN
andrew.drufke@creativefinancialdesigns.com
(317) 788-1562

Gene Griffin

Terre Haute, IN
gene@cplan.info
(812) 299-8900

Eric Grzegorski

Kokomo, IN
eric@ericgrzegorski.com
(765) 453-9600

Barry Hickey

Muncie, IN
barry.hickey@cfdinvestments.com
(765) 288-1927

Ryan Hickey

Muncie, IN
ryan.hickey@cfdinvestments.com
(765) 288-1927

Troy Jerrils

Alexandria, IN
troy.jerrils@cfdinvestments.com
(765) 724-2656

Justin Keeling

Kokomo, IN
justin.keeling@communitytaxservice.com
(765) 452-1986

Tim Kling

Mishawaka, IN
tkling@bridgeviewfinancial.com
(574) 855-3344

Andy Klinker

Hoagland, IN
andrew.klinker@cfdinvestments.com
(260) 420-0768

Jeff Larimore

Hobart, IN
jeff.larimore@cfdinvestments.com
(219) 942-8287

Kyle Marburger

Peru, IN
kyle.marburger@cfdinvestments.com
(317) 450-8985

Mike McNeal

Tipton, IN
mike.mcneal@cfdinvestments.com
(317) 578-9334

Les Miller

Brazil, IN
les.miller@cfdinvestments.com
(812) 442-1905

Milton Mingo

Fort Wayne, IN
milton.mingo@cfdinvestments.com
(260) 485-1306

Robert Mize

Avon, IN
robert.mize@cfdinvestments.com
(317) 272-4850

Len Neisler

Tipton, IN
len.neisler@cfdinvestments.com
(317) 507-5436

Jimm Nidlinger

Terre Haute, IN
jimm.nidlinger@cfdinvestments.com
(812) 299-4082

Ryan Ollar

Mishawaka, IN
ryan.ollar@cfdinvestments.com
(574) 273-0803

Bailey Owens

Kokomo, IN
bailey.owens@cfdinvestments.com
(765) 453-9600

Brent Owens

Kokomo, IN
brent.owens@cfdinvestments.com
(765) 453-9600

Mick Owens

Kokomo, IN
mick@mickowens.com
(765) 453-9600

Brian Quick

Indianapolis, IN
brian.quick@cfdinvestments.com
(317) 788-1562

Lisa Raderstorf

Logansport, IN
lisaraderstorf@wealthmgmtsolutions.com
(574) 722-4249

Otto Ray

Martinsville, IN
otto@raywealthmanagement.com
(765) 315-0503

Chris Rockey

Kokomo, IN
chris@chrisrockey.com
(765) 453-9600

Marc Rueffer

Carmel, IN
marc.rueffer@cfdinvestments.com
(317) 640-4806

Mark Smith

Greenwood, IN
mark.smith@cfdinvestments.com
(317) 439-7849

Robert Soohey

Crown Point, IN
robert.soohey@cfdinvestments.com
(219) 713-1488

Kurt Supe

Indianapolis, IN
kurt.supe@cfdinvestments.com
(317) 788-1562

Randy Umbaugh

Warsaw, IN
randy@diligentwealth.com
(574) 268-2844

Ryan Williams

Kokomo, IN
ryan@williamsfc.com
(765) 453-9600

IOWA**Bruce Western**

Cedar Rapids, IA
bruce.western@cfdinvestments.com
(319) 366-3818

KANSAS**Jimmy Gaona**

Lenexa, KS
jimmyg@lfswealthadvisors.com
(913) 322-0006

Melissa Gunter

Lenexa, KS
melissa@lfswealthadvisors.com
(913) 322-0006

Jim Guyot

Lenexa, KS
jim@lfswealthadvisors.com
(913) 322-0006

Jimmy Kelley

Lenexa, KS
jimmyk@lfswealthadvisors.com
(913) 322-0006

Jon Kobler

De Soto, KS
jon.kobler@cfdinvestments.com
(913) 583-1700

Gardner Lee

Overland Park, KS
gardner@bestfinancialkc.com
(913) 393-0399

Jill Woods

Olathe, KS
jill.woods@cfdinvestments.com
(913) 558-1138

KENTUCKY

Bill Breagy

Florence, KY
bill.breagy@cfdinvestments.com
(859) 746-2080

Charles White

Lebanon, KY
charles.white@cfdinvestments.com
(270) 692-2102

MAINE

Jake Oliver

Damariscotta, ME
jake.oliver@creativefinancialdesigns.com
(207) 380-1898

Damian Smith

Richmond, ME
damian.smith@cfdinvestments.com
(603) 557-4770

MICHIGAN

Bob Britton

Frankenmuth, MI
britton@ifpassociates.com
(989) 652-8559

Aric Carpenter

Okemos, MI
aric.carpenter@cfdinvestments.com
(517) 318-6059

Steven Carpenter

Shelby Township, MI
steven@covenantfg.com
(586) 739-3550

Chris Cochran

Sterling Heights, MI
chris.cochran@cfdinvestments.com
(586) 932-8270

David Kurschat

Shelby Township, MI
david.kurschat@cfdinvestments.com
(586) 739-3550

Alex Lebron

Flint, MI
alebron@bwealthmngt.com
(810) 695-1882

David Lolley

Adrian, MI
david@lolleyfinancial.com
(517) 759-1880

Paul Miller

Kalamazoo, MI
pmiller@artesianfinancialgroup.com
(269) 365-9171

Larry Weichel

East Lansing, MI
larry.weichel@cfdinvestments.com
(810) 922-7622

Stephen Werner

Shelby Township, MI
steve@covenantfg.com
(586) 739-3550

MINNESOTA

Dawn Walker

Hillwater, MN
dawn.walker@cfdinvestments.com
(651) 238-0303

MISSISSIPPI

Jim Kohlhepp

Saucier, MS
jkohl@cfdinvestments.com
(315) 336-7818

MISSOURI

Rick Bain

Lees Summit, MO
rbain@lighthousestrategies.com
(816) 537-5148

Jeremy Braden

Springfield, MO
jbraden@swsplanning.com
(417) 782-4463

Austin England

St. Louis, MO
austin@rachaelpcampwealth.com
(618) 401-4029

Suresh Fernando

Saint Charles, MO
suresh@pathfinderadvocates.com
(636) 229-6678

Ethan Hays

Lees Summit, MO
ehays@lighthousestrategies.com
(816) 537-5148

Matthew Holt

Lees Summit, MO
matthew@prolifeinvesting.org
(408) 612-6249

James Hoodenpyle

Springfield, MO
jhoodenpyle@swsplanning.com
(417) 880-4458

NEBRASKA

Michelle Christy

Lincoln, NE
michelle@leegrossman.com
(402) 420-6060

Lee Grossman

Lincoln, NE
lee@leegrossman.com
(402) 420-6060

NEW JERSEY

Daniel Ballister

Succasunna, NJ
daniel.ballister@cfdinvestments.com
(908) 304-5143

Richard D'Ambola

Succasunna, NJ
rdambola@cfdinvestments.com
(973) 927-3700

Peter Passalacqua

Hillsborough, NJ
ppass@frontierplanning.com
(908) 725-9001

NEW MEXICO

Jared Argo

Artesia, NM
jared.argo@cfdinvestments.com
(575) 703-0614

JD Brannan

Artesia, NM
jd@brannanfinancial.net
(575) 746-9869

NEW YORK

Al Chandler

Sherrill, NY
al@soundmindfinancial.com
(315) 821-2827

Jared Houseman

Sherrill, NY
jared@soundmindfinancial.com
(315) 821-2827

Chris Hull

Delevan, NY
chris.hull@cfdinvestments.com
(716) 698-8196

Paul LaPointe

Potsdam, NY
paul@northernwealthmanagement.org
(315) 265-8405

Adam Shelton

East Islip, NY
adam.shelton@cfdinvestments.com
(631) 277-2726

NORTH CAROLINA

Chris Beam

Morganton, NC
chris.beam@cfdinvestments.com
(828) 390-0529

OHIO

Orrie Augsburger

Bluffton, OH
orrie@myfaithinvestments.com
(419) 358-4207

Bill Clark

Columbus, OH
billclark@clarkguy.com
(614) 486-4500

Nolan Dill

Bowling Green, OH
nolan.dill@cfdinvestments.com
(567) 413-4392

Craig Drees

Fort Loramie, OH
craig.drees@cfdinvestments.com
(937) 295-2970

David Drummond

North Canton, OH
david.drummond@cfdinvestments.com
(330) 877-2923

Kevin Dusold

Cincinnati, OH
kevin.dusold@cfdinvestments.com
(513) 574-8594

Mike Dusold

Cincinnati, OH
mike.dusold@cfdinvestments.com
(513) 574-8594

Ben Forgrave

Newark, OH
ben.forgrave@cfdinvestments.com
(740) 975-7831

Standish Fortin

Cincinnati, OH
standish@fortinadv.com
(513) 792-2230

Wayne Fourman

Greenville, OH
wayne.fourman@cfdinvestments.com
(937) 548-5035

Adam Fullenkamp

Sidney, OH
adam.fullenkamp@cfdinvestments.com
(937) 492-8800

Dan Hoelscher

Sidney, OH
dan.hoelscher@creativefinancialdesigns.com
(937) 492-8800

Stephen Matson

Zanesville, OH
stephen.matson@cfdinvestments.com
(740) 454-7646

Terry May

Greenville, OH
terry.may@cfdinvestments.com
(937) 548-5035

Trent May

Greenville, OH
trent.may@cfdinvestments.com
(937) 548-5035

Rick McDaniel

Gallipolis, OH
rick.mcdaniel@cfdinvestments.com
(740) 441-9941

Diane Ray

Fairfield, OH
diane.ray@cfdinvestments.com
(513) 860-0084

Stanley Riggs

Bowling Green, OH
stanley.riggs@cfdinvestments.com
(567) 413-4392

Doug Shields

Greenville, OH
douglas.shields@cfdinvestments.com
(937) 548-5035

Tim Wright

Hilliard, OH
tim.wright@cfdinvestments.com
(614) 559-3835

PENNSYLVANIA**Joe Guenot**

Julian, PA
joseph.guenot@cfdinvestments.com
(814) 692-4034

Joe Hidalgo

Richboro, PA
joe.hidalgo@cfdinvestments.com
(267) 981-8000

Richard Keith

Duncansville, PA
richard.keith@cfdinvestments.com
(814) 696-3076

Scott Lucas

Greensburg, PA
scott.lucas@creativefinancialdesigns.com
(724) 875-2202

James Martin

Fort Loudon, PA
jmartin@planningpays.net
(717) 369-2300

David Simeone

Monroeville, PA
david.simeone@creativefinancialdesigns.com
(724) 875-2202

SOUTH CAROLINA**Marty Shapiro**

Travelers Rest, SC
martin.shapiro@cfdinvestments.com
(864) 275-4175

SOUTH DAKOTA**Saeed Sulaiman**

Rapid City, SD
saeed@shieldfin.com
(605) 431-8337

TENNESSEE**Brandon Akers**

Signal Mountain, TN
brandon.akers@cfdinvestments.com
(615) 522-8504

Nancy Guillen

Morristown, TN
nguillen@southernheritageinvestments.com
(423) 438-0107

Jason Murphy

Cookeville, TN
jason.murphy@cfdinvestments.com
(931) 252-0201

Daryl Phillips

Sparta, TN
daryl.phillips@cfdinvestments.com
(931) 260-5570

Jeffrey Sturm

Dandridge, TN
jeffrey.sturm@cfdinvestments.com
(217) 417-6258

TEXAS**Steven Neustaedter**

Houston, TX
steve@blackmontadvisors.com
(281) 549-4444

VIRGINIA**Todd Glenn**

Harrisonburg, VA
todd.glenn@cfdinvestments.com
(540) 820-8633

WASHINGTON**Nathan Cruz**

Tacoma, WA
nathan@stewardwm.com
(831) 205-2447

WISCONSIN**John Kampen**

Endeavor, WI
john.kampen@cfdinvestments.com
(608) 697-3295

The content of this booklet, and specifically the compilation of contact information regarding cfd financial advisers is proprietary and may not be shared with, disseminated or otherwise provided to any person or entity that is not currently affiliated with or employed by cfd Investments, Inc. or creative financial designs, inc. Further, the information may not be used in a manner that is contrary to the firms' interests and any such use would constitute a breach of the financial adviser's registered representative contract with cfd Investments, Inc. the firm will seek all available legal remedies to any violation of this requirement.

CFD DIRECTORY

OFFICE OF THE PRESIDENT

Brent Owens 765.553.3006

President of CFD Companies brent.owens@cfdinvestments.com

Lydia Howard 765.553.3059

Assistant to Brent Owens lydia.owens@cfdinvestments.com
& Onboarding Ambassador

Mallory Butts 765.553.3071

Assistant to Brent Owens mallory.butts@cfdinvestments.com

Sabrina Edwards..... 765.553.3007

Assistant to Brent Owens sabrina.edwards@cfdinvestments.com

Brandi Owens 765.553.3058

Program Manager brandi.owens@cfdinvestments.com

Roberta Alvarez..... 765.553.9600

Receptionist roberta.alvarez@cfdinvestments.com

PROCESSING

Kris Hale..... 765.553.3008

cfid Investments Vice President, kris.hale@cfdinvestments.com
Director of Processing, Principal

Sandra Hlebasko 765.553.3009

Brokerage Account Coordinator sandra.hlebasko@cfdinvestments.com

Cynthia Rodman..... 765.553.3014

Direct Business Processing cynthia.rodman@cfdinvestments.com

Felicia King 765.864.4089

Direct Business Processing felicia.king@cfdinvestments.com

Kim Sanders 765.553.3055

Brokerage Distribution Specialist kim.sanders@cfdinvestments.com

Sherry Hight 765.553.3011

Registered Principal sherry.hight@cfdinvestments.com

Anna Owens 765.553.3013

Processing Specialist anna.owens@cfdinvestments.com

Jaret Humphrey..... 765.553.3069

Processing Associate jaret.humphrey@cfdinvestments.com

INVESTMENT MANAGEMENT

Kregg Rooze 765.553.3018

Vice President, kregg.rooze@creativefinancialdesigns.com
Managed Accounts Director

Christine Trine 765.553.3043

Fee Administrator christine.trine@creativefinancialdesigns.com

Jamie Barber 765.553.3051

Adviser Advocate, Sales, jamie.barber@cfdinvestments.com
& Growth

Ian Reid..... 765.553.3039

Investment Manager/Analyst ian.reid@creativefinancialdesigns.com

Brent Anderson 765.553.3021

Data Controller brent.anderson@creativefinancialdesigns.com

Carrie Kuhns 765.553.3023

Registered Principal carrie.kuhns@creativefinancialdesigns.com

Bailey Owens..... 765.553.3056

Investment Analyst bailey.owens@creativefinancialdesigns.com

Cole Schroeder 765.553.3028

Trade Coordinator cole.schroeder@creativefinancialdesigns.com

Christin Clark..... 765.553.3042

Principal christin.clark@creativefinancialdesigns.com

Matt Powlen..... 765.553.3019

Principal matt.powlen@creativefinancialdesigns.com

Ryan Wright 765.553.3050

Investment Manager ryan.wright@creativefinancialdesigns.com

Braeden Bryant 765.553.3075

Trade Associate braeden.bryant@creativefinancialdesigns.com

COMPLIANCE

Matthew Bahrenburg..... 765.553.3030

Chief Compliance Officer matthew.bahrenburg@cfdinvestments.com

Kelly Stockberger..... 765.553.3016

Compliance Chief of Staff, kelly.stockberger@cfdinvestments.com
Principal

Louis Urbancic 765.553.3067

Compliance Director louis.urbancic@cfdinvestments.com

Anna Owens 765.553.3013

Compliance Specialist anna.owens@cfdinvestments.com

Liam Ireland..... 765.553.3052

Compliance Analyst liam.ireland@cfdinvestments.com

Hannah Minns 765.553.3044

Compliance Assistant hannah.minns@cfdinvestments.com

Jeanne Miller..... 765.553.3064

Compliance Assistant jeanne.miller@cfdinvestments.com

Maria Barnes..... 765.553.3066

Compliance Specialist maria.barnes@cfdinvestments.com

PLANNING

Kiersten Tate..... 765.553.3061

Financial Plan Writer kiersten.tate@creativefinancialdesigns.com

Abbi Meyer..... 765.553.3063

Financial Planning Associate abbi.meyer@cfdinvestments.com

BUSINESS DEVELOPMENT

Zachary Covert..... 407.761.1813

Director of Business Partnerships zachary.covert@cfdinvestments.com

VIRTUAL ASSISTANTS

Meredith Kesler	765.553.3034
Virtual Assistant Director	meredith.kesler@cfdinvestments.com
Carrie Salinas	765.553.3054
Virtual Assistant	carrie.salinas@cfdinvestments.com
Bethany Hartman	765.553.3057
Virtual Assistant	bethany.hartman@cfdinvestments.com

INFORMATION TECHNOLOGY

Gerry Good	765.553.3031
Director of Technology	gerry.good@cfdinvestments.com
Craig Malson	765.553.3020
Docupace Developer	craig.malson@cfdinvestments.com
Zach McComas	765.553.3037
Infrastructure Specialist	zach.mccomas@cfdinvestments.com
Tristan Good	765.553.3017
IT Technician	tristan.good@cfdinvestments.com
Mark Atkins	765.553.3027
IT Specialist	mark.atkins@cfdinvestments.com

MARKETING

Sarah Swoverland	765.553.3062
Marketing Director	sarah.swoverland@cfdinvestments.com
Rafael Lopez	765.553.3036
Creative Collaborator, Business Development	rafael.lopez@cfdinvestments.com
Alexis Pier	765.553.3068
Marketing Associate	alexis.pier@cfdinvestments.com
Lizzie Ventura	765.553.3065
Graphic Designer	lizzie.ventura@cfdinvestments.com
Grayson Weddell	765.553.3032
Marketing Associate	grayson.weddell@cfdinvestments.com
Joshua Houpt	765.553.3032
Marketing Communications Specialist	joshua.houpt@cfdinvestments.com

ACCOUNTING

Greg Smith	765.553.3026
Managing Resource Director	greg.smith@cfdinvestments.com
Liz Carson	765.553.3029
Director of Accounting	liz.carson@cfdinvestments.com
Karen Wooten	765.553.3010
Commissions Specialist	karen.wooten@cfdinvestments.com
Michael Grady	616.560.4229
Financial Systems Manager	michael.grady@cfdinvestments.com
Makayla Hubartt	765.553.3012
Financial Systems Associate	makayla.hubartt@cfdinvestments.com

HUMAN RESOURCES

Jamie Lubben	765.626.0045
Human Resources Director	jamie.lubben@cfdinvestments.com

CFD TAX PREPARATION AND BOOKKEEPING SERVICES

Wayne Albright	765.553.3024
Tax Preparer	wayne.albright@cfdinvestments.com
Tracie Delph	765.553.3025
Tax Specialist	tracie@cfdtaxprep.com

ALTER & ROCKEY

Justin Alter	765.553.3048
Attorney	justin@alterandrockey.com
Brooke Rockey	765.553.3004
Attorney	brooke@alterandrockey.com

TEAM EMAILS

Cash Request	
Request cash raised in a client's Creative's in-house managed accounts at NFS and Charles Schwab for an upcoming distribution or transfer.	cashrequest@creativefinancialdesigns.com

Distributions	
Request CFD Investments to process a distribution, ACH, or move money request on NFS account.	distributions@cfdinvestments.com

Docupace STP	
Assistance with Docupace work items, Straight Through Processing (STP) questions and problems.	stp@cfdinvestments.com

IT Help Desk	
Assistance with technology-related questions and problems.	help.desk@cfdinvestments.com

Managed Accounts	
Request managed account illustrations, strategy proposal tools, or general information – and connect directly with a member of Creative's in-house management team to get your questions answered.	managedaccounts@creativefinancialdesigns.com marketing@creativefinancialdesigns.com

Marketing (CFD)	
Assistance with general marketing questions.	marketingteam@cfdinvestments.com

Planning	
Assistance with questions pertaining to financial planning.	planning@creativefinancialdesigns.com

Sycamore Help	
Assistance with Sycamore and commissions-related questions.	sycamore.help@cfdinvestments.com

Virtual Assistants	
Utilized by advisers who subscribe to the services of the CFD Virtual Assistant team.	virtualassistant@cfdinvestments.com

OUR MISSION

The CFD Companies are financial organizations dedicated to providing Financial Advisers with the necessary support, tools, techniques, quality financial products and technologies for the achievement of the clients' goals and objectives through a team of home office personnel committed to serving advisers in a Christ-like manner, believing you cannot push someone to the top of the mountain without getting there yourself.

THANK YOU



DOWNLOAD OUR EVENT APP

whova.com/portal/EZbKBs-hYO5okOij7OIFDarCd5X2LWz9Ow1lgoQVYr4=

Toll Free: 800.745.7776 | Phone: 765.453.9600 | Fax: 765.864.4080

Advisory services are provided through Creative Financial Designs, Inc. Registered Investment Adviser, and securities are offered through cfd Investments, Inc., a registered Broker/Dealer. Member FINRA and SIPC
2704 S Goyer Rd, Kokomo, IN 46902. 765.453.9600