





The Independent Excellence Group is a distinguished group of Financial Advisors and Insurance Professionals who have had the privilege of working extensively with many prominent groups and individuals in the areas of Wealth Management, Retirement and Income Planning. We take pride in knowing that throughout the years, our group has had great success in materially improving upon our clients' retirement and insurance plans. We mark those successes with the knowledge that we have helped to protect and preserve our clients' wealth from market losses. In many instances, in terms of actual performance, they have often done better than expected.

Throughout our history, the work that we've done and the results we have produced for our clients represent the outcome of a tremendous amount of study and effort by our group; we are privileged to be described by others in the wealth management field as The Independent Excellence Group.

Our group is dedicated to the basic ideals and goals of our profession. With determination, we work to bring those attributes back to the marketplace and to the public. We know and we appreciate the importance of our clients' wealth preservation and the potential for a guaranteed income for life during retirement years.

Those who call upon us, or are referred to us, are generally well established in their lives. They are aware that their retirement and personal investment plans are extremely important, and they have a strong need to feel confident in the plans they select. Recognizing that the retirement world has changed, they are seeking to achieve financial independence and a consistent, significant, performance - with limited losses in their plans. As independent insurance professionals, we also have the ability to provide the product solutions that will best meet our clients' needs, without any company affiliations.



It is for these reasons that we have joined forces collegially and intellectually. While functioning independently, we come together as a group, from across the United States, several times per year to update, to learn, to share and to take away new ideas, procedures and practices. Through this assembly, we believe we can better understand and survey the vast financial landscape in an effort to provide our clients with access to many of the most cutting-edge tools and concepts available from the world's premier financial companies.

We exist to honorably serve the community by providing financial products and services of superior quality while tapping the latent creative powers within the group. We work on continual improvement in all that we do in terms of ideas, quality and client satisfaction. Our promise to our clients is honesty, integrity, ethics in all aspects of our business and, above all else, service to them.

For additional information on
The Independent Excellence Group, and the elite
professionals who are a part of it, please visit
www.independentexcellencegroup.com



Individually, IE Group members represent a myriad of prominent individuals from corporations, medical and scholastic establishments, professional sporting associations, and public and private organizations. A partial listing includes:

- Amazon
- Abbott Laboratories
- Army Research Laboratory
- ATT
- Barbara Ann Karmanos Cancer Center
- BASF Chemical
- Baylor University and Medical School
- Boeing
- Bosch Corporation
- Bristol Myers-Squibb
- Burroughs Corporation
- Champion Spark Plug
- Chesapeake Oil & Gas
- Chevron
- Chicago Bears
- CIA
- City of Detroit
- Columbia University Medical School
- Compuware Corporation
- Cornell University School of Medicine
- Daimler Chrysler
- Dallas Cowboys
- Dana Corporation
- Delphi
- Department of Health & Human Services
- Department of Homeland Security
- Detroit Red Wings
- DuPont
- East Jefferson Anesthesia
- Enable Midstream Partners
- Exelon (PECO)
- Exxon
- Federal Aviation Administration
- Federal Mogul
- Ford Motor Company
- General Motors
- Halliburton
- Harvard University School of Medicine
- Henry Ford Health System and Hospital
- Houghton-Mifflin
- Integris Baptist Hospital
- John Hopkins Hospital and Medical School
- LaPlace Dermatology
- Lear
- Lockheed Martin
- LSU-Medical
- Louisiana State University
- Mass General Hospital
- McGraw-Hill
- Merck Corporation
- Mercy Hospital
- Microsoft Corporation
- Molly Maid
- Monsanto Chemical
- NASA
- National Cancer Institute
- National Counseling Group
- National Institutes of Health
- Nestle Corporation
- NOAA
- NSA
- Nuclear Regulatory Commission
- OGE Energy
- Oklahoma Natural Gas
- Oklahoma State University
- Oklahoma University
- ONEOK
- Orthopedic and Sports Therapy of Kenner
- Parke Davis
- Pfizer
- PGA
- Rockwell Corporation
- Shell Oil
- Sheller Globe
- St. Anthony's Hospital
- Sun Oil (Philadelphia Energy Group)
- The D.M.C. Medical Center and Hospitals
- The Mayo Clinic
- The Michigan State Police
- The NAACP
- Tulane University
- Union
- University of Chicago Pritzker School of Medicine
- University of Michigan Medical School and Hospital
- University of Washington Medical School
- USA Credit Union
- Verizon
- Visteon
- Wayne State University Medical School

