James A. Gunn, Jr.

Ph.D., MBA, Business Adm.

LPL Investment Advisor Representative and Registered Principal

Former Assoc. Prof., Oklahoma State University College of Business; faculty, Univ. of Arkansas

Forty years experience as estate planning consultant, including life insurance and investment services for broad range of clients.

Prior corporate board member of First National Bank, Stillwater Medical Center, HomeCall, a home health services provider, and board member of Vending and Food Service Company.

Over 50 years leadership service in Presbyterian Church as Elder, Moderator of Presbytery and Synod Foundation Board

Matt E. Streeter, CFP®

LPL Registered Administrative Associate

First Gunn Financial Group Partner

Certified Financial Planner™

Oklahoma State University Graduate
Bachelor's Degree in Finance

Serving in Stillwater:
Stillwater Public Education Foundation Board
Young Life Committee
Stillwater Area Sports Association Board
Young Professionals of Stillwater Board
Leadership Stillwater Class 22

Fourteen years experience as vice president of commercial bank.

OSU STAFF and FACULTY:

Do you want to work with a local **independent** advisor to evaluate your retirement strategy?

You can!

First Gunn Financial Group is one of only a few local investment advisors who are qualified to manage your 401(a), 403(b), and 457(b) OSU retirement program accounts.

Having an independent advisor gives you greater control and flexibility in developing your overall retirement portfolio. We can help you pursue the best possible outcome from a wide range of investments, insurance, retirement accumulations, distribution planning and taxation.

Plus, working with us you will feel right at home. We are long-time residents of the Stillwater area and part of the same community as you.

First Gunn Financial Group
405-624-0330
www.firstgunnfinancial.com

First Gunn
FINANCIAL GROUP

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First Gunn Financial Group's Approach:

Establish Your Financial Objectives

You talk. We listen. Together we clarify your financial goals and how best to pursue them.

Analyze Your Financial Plan

We evaluate your financial status and work towards creating a diversified portfolio that takes advantage of a wide range of financial opportunities.

Discuss and Implement Your Plan

It is important that you understand and are comfortable with your investment strategy. Once you agree what works best for your particular needs, we strategically put the plan into action.

Review Your Plan's Performance

We monitor and evaluate your financial strategy, schedule review meetings to discuss your plan's performance, and make appropriate recommendations as needed to help you work toward your goals.

MISSION STATEMENT

Our mission is to provide financial security for our clients through personalized planning. This entails wealth accumulation and preservation which focuses on each client's individual objectives.

What is First Gunn Financial Group?
We are Investment Advisor Representatives (IARs) working directly with LPL Financial, an Independent Broker/Dealer and Registered Investment Advisory (RIA) firm. As our client you will benefit from our ability to offer an array of comprehensive strategies that can be adapted for your specific needs and long-term objectives.

Why choose First Gunn Financial Group? Our financial experience is vast, providing you with independent advice and comprehensive strategies that have only your best interests in mind. We pride ourselves on our professionalism and personalized service that has earned us the trust and confidence of many individuals, families and businesses.

What is LPL Financial?

LPL Financial is one of the nation's leading financial services companies and a publicly traded company on the NASDAQ under ticker symbol LPLA. The firm's mission is rooted in the belief that objective financial guidance is a fundamental need for everyone. LPL does not offer proprietary investment products or engage in investment banking activities. This means advisors affiliated with LPL are not pressured or influenced by LPL to sell its products. At the same time, LPL advisors are able to rely on various tools that help them serve their clients in the best way possible toward achieving their investment goals.