



VIVID VISION 2028



▶ **SNAPSHOT**

It's **January 1st, 2028**, and Slagle Financial is the top retirement firm in each of its geographic footprints.

We ensure every retiree has a game plan to live a rich and fulfilling life without compromising financial security or peace of mind. Our relationships are built on trust that spans generations as we help families establish, create, and maintain their legacies. **We are the last financial advisors our clients and their families will ever need.** When people think of retirement, they think of Slagle Financial first.



CORE VALUES



Trust

We do our best work because we can all rely on each other. We take responsibility for our actions and trust each other to think, act, and lead with care.



Honesty

We're transparent and tell the truth whether it benefits us or not. We always stay true to our word and come through on our commitments.



Integrity

We demonstrate sound moral and ethical principles and always default to doing the right thing. We overdeliver no matter who is watching.



Approachability

We are open, eager, and enthusiastic in our conversations. All opinions and ideas are valued here, leaving no room for unfriendliness.



Team Work

We're stronger when we work together. Partnership allows us to be more effective while making work more enjoyable.



Constant Improvement & Evolution

We may be smart, but we never stop learning. We go beyond just adapting to truly embrace the changes needed to lead.

▶ CULTURE

Team members walk into our offices each day with a calm and collected demeanor, knowing they're here to make a positive impact. Motivated by genuine care rather than obligation, their enthusiasm is contagious, leading to satisfied clients who feel valued and appreciated. **We serve our people in the biggest ways and the smallest gestures because our relationships with them are deep and ongoing.** We're not about singular touchpoints and transactions; we check in consistently to catch up and celebrate milestones together.

A consistent pulse of information allows everyone to feel like they have a voice. Conference rooms are bustling with multiple appointments streaming through, yet the team keeps the work light-hearted with laughter and chatter. Our open-door policy ensures that everyone feels comfortable approaching leadership with suggestions or concerns, further strengthening trust and collaboration. This kind of transparency fosters a sense of ownership and accountability among team members. **We hire for personality, trusting that each person will work with us, not for us.**

Monday leadership meetings kick off the week with fresh updates, while frequent department-specific meetings take on a more specialized focus. Monthly and quarterly mentorship and training meetings allow us to pivot in real time. **Mistakes are never bad in our book, as long as we learn from them and put a system in place to prevent repetition.**

Our positive momentum is fueled by the goals we meet, and we believe that small actions can compound dramatically. Through the Nectar points system, we celebrate great work by giving shout-outs and awarding points for gift cards and extra paid time off. **Leaders recognize team members within their departments, and we enjoy treating them to unexpected surprises.** Each quarter, we celebrate with team-building activities like rock climbing, axe throwing, ropes courses, and escape rooms. Our annual celebration of our production goal is a chance to recognize hard work and foster team spirit. When we reach our goals, we celebrate by taking a company trip to an exciting destination chosen by our President and Founder, Chad Slagle. By making these celebrations the highlight of the year, we reinforce a culture of appreciation and teamwork that not only honors past successes but also sets the stage for future achievements.

Each of us has the ability to be a great coach or mentor. We help raise the bar for one another, cultivating a natural pipeline of leadership, which helps us expand without sacrificing service. By providing resources like a library of business books, access to a variety of podcasts, and opportunities to participate in leadership courses, we empower our team members to pursue their interests and develop new skills. This investment in growth not only prepares future leaders but also strengthens our organization's overall capabilities.



TEAM

Chad Slagle, Founder and CEO, is the visionary and driving force behind the business. His focus on growth and identifying new opportunities is crucial for long-term success. By staying attuned to emerging trends and acting on them, he positions the practice for expansion and ensures it remains relevant in a competitive market. **Chad Tobin, our CIO**, manages our A-team of producing and service advisors, ensuring they attract new clients and effectively close deals. His oversight of Assets Under Management further emphasizes his commitment to maintaining client relationships and financial health. **Sarah Newton, the COO**, oversees the organization and growth of the company. As our quarterback, she ensures our offices across the country run efficiently while maintaining team cohesion and culture. By providing department leaders with clear goals and direction, she helps ensure everyone is aligned and focused on the company's objectives. Additionally, we have a third party keeping a close eye on compliance and monitoring financial reporting.

Our **Client Service Specialist Director** keeps our client service team and advisors up to date by continuously monitoring market trends and new developments. This proactive approach helps maintain strong client relationships and adapt strategies to meet changing needs. By overseeing appointment preparation and ensuring timely communication, they foster smooth operations for client satisfaction. Our **Client Operations Director** plays a vital role in streamlining client processing and communication. By focusing on returning calls promptly and meeting production targets, they contribute significantly to operational efficiency and client satisfaction. Meeting production numbers is key to the overall success of the business.

Our **Marketing Director** is the creative conduit driving high-level brand awareness. They are perpetually one step ahead of the competition, consistently bringing cutting-edge ideas to the table and helping implement them with their team. Their responsibility for planning well-executed events adds significant value, as these experiences not only strengthen client relationships but also provide educational content and marketing updates. The **Director of First Impressions** is a key player in creating a welcoming and positive atmosphere for our clients. By ensuring clients feel valued from the moment they arrive and throughout their interactions, they enhance the overall client experience.



OFFICES

Our offices are homey, fresh, and places where clients are always happy to be. The clean, streamlined aesthetic features natural light streaming into modern spaces with glass walls and welcoming conference rooms. This environment grows and expands to wherever our clients are, and our Midwestern ability to care for people follows as we continue building the blueprints to scale. That same feeling of home greets you at each of our geographic locations—**regardless of which door you walk through, the same culture and customer service await you, accompanied by a friendly smile.**

CORE BUSINESS ACTIVITIES

We provide retirement strategies that educate and empower people to seize their retirements by the horns. **As our clients' financial quarterbacks, we create game plans that allow those who have just retired, are retired, or plan to retire soon to enjoy the next chapter of their lives without outliving their hard-earned money.** Our Guided Planning System (GPS) builds the blueprints for clients to find all the tools and vehicles needed to construct their financial house, while we leverage our network of specialists and industry partners to lay the foundation.

As fiduciaries, we're here to be educators and coaches—not salespeople. Each client goes through our signature, step-by-step financial GPS process to receive a custom-tailored plan for where they currently are—not a cookie-cutter strategy. Our clients are an extension of our family, and our relationships with them go way back. Therefore, we ensure we always have the right vehicles in place and never leave anything to chance when it comes to their retirement. **We are blessed with a deep, often multi-generational trust, and we never take for granted the fact that we're helping real families establish, create, or maintain their legacies.**



SALES & MARKETING

When someone in our geographic foothold thinks of retirement, they think of Slagle Financial. Our presence has become well known through our long-running TV show, "The Chad Slagle Show: Coaching You to and Through Retirement," and our prevalent radio show, "The Financial Symphony." However, the largest portion of our business comes directly from referrals. Our ideal clients are blue-collar individuals who have worked hard for their money and are driven by strong family values and the motivation to leave something behind for their kids and grandkids. We've shifted our resources to where our ideal clients spend most of their time. Client referral events, such as lunch and learns, educational events, golf outings, and special VIP events, keep things fun for the team and enjoyable for the clients, with many bringing the whole family along to meet us. Digitally, our social media and landing pages keep prospects engaged while ensuring we remain at the forefront of the market. **Our multifaceted approach to building brand awareness and client relationships is commendable.** By combining traditional outreach with modern digital strategies, we create a robust system that attracts and retains clients.



TEAMING UP *for* GOOD

THE SLAGLE FINANCIAL FOUNDATION

888.294.9

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▶ GIVING FORWARD

We are committed to having a positive presence in the communities surrounding our office locations across the country. **Our charitable organization, Teaming Up for Good, a 501(c)(3), focuses its philanthropic contributions on first responders, military personnel, and children, aligning with the values of our clients.** We hold fundraising events like golf tournaments, participate in building beds for kids in need, and donate to Bikes or Bust. **We never stop seeking new causes and volunteer opportunities to help others in our community live fulfilling lives.**

▶ FOUNDER FEELING



The quote by Ralph Waldo Emerson, “**Life is a journey, not a destination,**” emphasizes the importance of enjoying the process and experiences along the way rather than solely focusing on end goals. This quote encourages individuals to **live in the moment, learn from past experiences, and discover purpose in life’s journey.** The journey itself is where real growth happens. Each challenge we face along the way teaches us valuable lessons. That is what makes me who I am and strengthens the team as a whole. Embracing the process not only prepares us for the destination but also enriches our experience and strengthens our resilience.

Embracing challenges and hardships makes us stronger at the end of the day and fosters a sense of unity and shared purpose within the team. It’s amazing how facing difficulties together can clarify our vision and create a sense of freedom and excitement. We made the decision to embark on this journey, and I’m glad we did. Now everyone understands what that vision looks like and how we’ve all grown from it, and I’m so excited about this sense of freedom we’ve gained from fully committing and bringing all of this to life.

Every day, we get to do what we love, and in doing so, the possibilities are endless. **The team is filled with a sense of ownership and great satisfaction.** This is something that we built together. Look at all that we’ve accomplished! Celebrating our achievements while looking forward to what’s next is a powerful motivator. **It’s inspiring to see how far we’ve come and what lies ahead. There’s so much more we can do because of who we’ve each become in this process.**

Do you think you have what it takes to be part of this kick-ass team?

Are you okay being in uncomfortable situations in order to grow?

Give us a call.

