

NICHOLAS L. GREGORY
YOUR LIFESTAGE COACH

Nicholas L. Gregory has over 32 years of experience within the financial services industry to assist him in serving clients through his firm's *financial engineering process*SM.

He is both Founder and President of The Financial Engineering Institute, LLC; the governing body and grantor of the professional designation, Chartered Financial Engineer.

He is also Founder and President of both The Charitable Capital Design Center, LLC and The Financial Engineering Alliance, LLC.

Mr. Gregory functions as a speaker, author and consultant in the areas of investment, taxation, estate preservation, employee benefits, business succession, retirement planning, asset protection and charitable planning.

He consults with attorneys, accountants and other financial services professionals and organizations in better serving their clients.

He conducts numerous types of seminars and workshops for colleges, universities, associations, national conventions and other groups.

Mr. Gregory holds a Bachelor of Science degree in Business Administration from Ball State University with minors in Economics and Finance.

He is a member of the Financial Planners Association and the National Committee On Planned Giving.

He is proud to have earned the following professional designations:

Chartered Financial Engineer
Certified Estate and Business Analyst
Certified Financial Planner®



*Life is not a spectator sport.
Clarify, amplify and launch your
dreams with controlled vitality.*

**Your
Contact
Information
Here**

PROGRAM GOVERNED BY
THE FINANCIAL ENGINEERING INSTITUTE, LLC
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BOOMERSM
LIFESTAGE COACHING

**Sample Client
Brochure**



BOOMER LIFE_{STAGE} COACHINGSM
Empower — Enlighten — Transform

Enjoying success by living life to the max through your ageless passion can create time constraints.

Multi-tasking on the move between career, family and play as you travel through life's stages can take precious time away from dealing effectively with your financial affairs and your dreams.

Obtaining the objectively competent advice required in coping with today's complex financial world can be extremely difficult.

This exclusive concierge services Program was designed with these issues in mind. It encompasses an elite team of professionals located across the country coupled with an extensive website.

_____ focuses on improving your *financial CORE strength* to achieve your dreams. He/She engineers your *financial life support systemSM* within the surrounding financial, legal and economic environment.



FINANCIAL ENGINEERING

- ♦ We drive your dreams by developing financial strategies that provide the flexibility and balance necessary in adjusting to today's constant change.
- ♦ We use our experience, creativity and cutting-edge knowledge to provide tax and legal planning tactics often overlooked.

FINANCIAL PRODUCT SELECTION

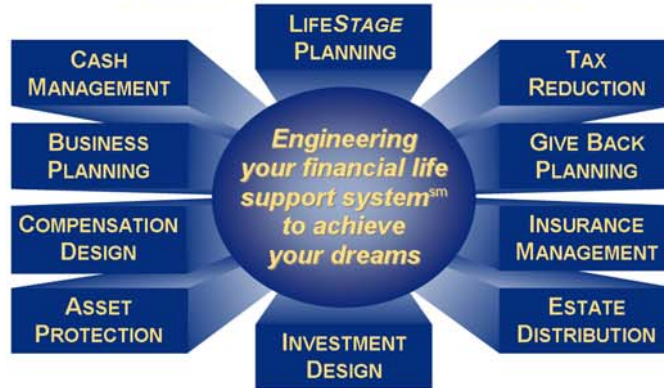
Properly designed insurance and investment products are integrated into your overall financial plan.

THE RESULT — YOUR DREAMS BLUEPRINT

OpenOption dream architectureSM interfaced with properly designed products and services . . . monitored and refined as needed.

BOOMER LIFE_{STAGE} COACHESSM
 AN ELITE NATIONAL TEAM OF PROFESSIONALS
 Pursuing Peak Financial Performance

THE FINANCIAL ENGINEERING PLATFORM
 OpenOption Dream ArchitectureSM



Visit
boomerlifestages.com

- Raise your game*
- Take a fresh perspective*
- Use our time-tested, leading edge approach*

Using uncommon sense to enhance your financial **CORE** strengthSM . . .

Clarify your financial objectives and dreams

Organize your financial affairs to achieve

Reduce your risks of financial loss to protect

Enhance financial performance to prevail



THE ZEAL OF YOUR COACH — A CUT ABOVE

_____ takes a forward motion perspective in providing a robust array of financial services and product solutions. His/Her qualifications reflect his/her passion:

- ♦ Maintains at least one of the following professional designations: ChFE, *CLU®, *ChFC®, CFA, CFP®, CPA, PFS, JD, AEP, CEP, CIC
- ♦ Has a minimum of ten years of dynamic financial engineering experience.
- ♦ Adheres to the Financial Engineering Institute's code of ethics.
- ♦ Completes a minimum of twenty hours of innovatively powerful continuing education each year.

INDEPENDENT — EXPERIENCED — COMPETENT — DEDICATED