Stribling~Whalen
Financial Group

The advisors at Stribling~Whalen Financial Group (SWFG) provide comprehensive investment planning and tax planning strategies to a wide range of clients.

Our marathon mission

Pre-training preparation

Begin the planning process and discuss:

- Life goals and dreams
- Priorities
- Concerns and Opportunities
- Current situation
- Tax Planning and Strategy

Marathon roadmap process

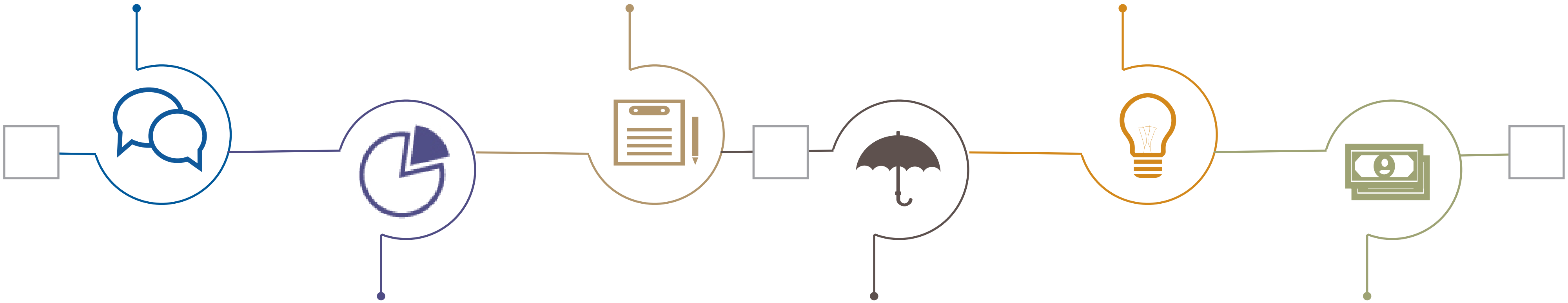
Formalize your plan

- Portfolio construction
  - current vs. recommended
- Manager selection
- Debt management
- Employee benefits review
- Net worth statement

Pre-marathon preparation

Retirement encore, Medicare and legacy

- What is your encore?
- Medicare strategy session
- Housing



Investment philosophy synchronizer

Calibrate and manage investment expectations

- The markets and you
- Investment discipline
- Activity and inactivity

Family security training

Insurance and estate review

- Life, disability, property and casualty review
- Everplans
- Will, power of attorney, and health care power of attorney

Marathon income plan

Creating your retirement income plan

- Saving vs. spending
- Social Security strategy
- Retirement income preparation
- Retirement income maintenance

Stribling~Whalen
Financial Group

Firmly rooted in the Gainesville area, the advisors at Stribling~Whalen Financial Group (SWFG) are dedicated to building client relationships based on trust, regular client communication, and exceptional service. Warren Stribling and Brian Whalen are each CERTIFIED FINANCIAL PLANNER™ practitioners with over 80 years of combined investment management experience of guiding client portfolios through a wide range of market cycles to help achieve financial goals. SWFG currently serves 20 clients in states across the country.

Warren D. Stribling IV, CFP®
Principal

As a Financial Advisor with over 49 years of lessons learned, Warren is committed to providing his clients with exceptional investment guidance and personal service. Taking the time to listen to his client's financial needs, Warren develops personalized solutions to help manage and preserve his client's assets.

Warren graduated from the University of Georgia and received a BA in Risk Management and Insurance from the Terry College of Business. He has also earned his CFP® designation.

Away from the office, Warren is very involved in the community and volunteers his time to a number of organizations.

Warren and his wife Jamie are active members of Grace Episcopal Church and live in Gainesville. They have three grown children and five grandchildren. They enjoy college football, hiking and relaxing in the mountains of North Carolina, and reading.

Brian E. Whalen, CFP®, CIMA®, AIF®
Principal

With over 29 years of lessons learned in the financial services industry, Brian has developed a keen understanding of the issues that investors face. He takes a thoughtful approach with each client and sincerely listens as he helps them plan for their financial goals and objectives.

Brian graduated Magna Cum Laude from Boston College with a BA in Economics. He has furthered his professional development by earning the CFP®, the Certified Investment Management Analyst (CIMA®) certification, and the Accredited Investment Fiduciary (AIF®) designation.

Brian is a member of Gwinnett Church. He is an avid backpacker and has hiked over 600 miles of the Appalachian Trail. He also enjoys genealogy, history, and reading. His twin boys and daughter have graduated college and his youngest son is in college.

Jacob Beauchamp, AAMS®
Financial Advisor

Jacob enjoys building and developing client relationships and strives to help anyone the best way he can and to leave a lasting impression.

Jacob graduated from the University of North Georgia with a BBA degree in Accounting where he also competed on the baseball team. His career began as a State Auditor with Georgia Department of Audits and Accounts and later as an Accountant with Northeast Georgia Health System. In 2018, he completed his MBA from Georgia College and State University.

Jacob resides in Flowery Branch with his wife Kelsey, son Baylor, daughters Collins and Sutton, and their dogs Lola and Maple. They enjoy sports and all the young family activities. As members of 12Stone Church they enjoy volunteering their time on Sunday.

Warren Stribling, CFP®
Principal

Brian E. Whalen, CFP®, CIMA®, AIF®
Principal

Jacob Beauchamp, AAMS®
Financial Advisor

Cindy Casey
Registered Client Service Associate

Lauren Tuttle
Client Service Associate

Christa Griffin
Client Service Associate

Kayleigh Dell
Client Service Associate

620 Spring Street SE
Gainsville, GA 30501
(678) 989-0048 office
(678) 828-5775 fax

www.striblingwhalen.com