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Fagan Financial Group of Raymond James Charts Course for Investors

John Fagan, CFP® is a marathon runner, and he welcomes clients to the long run. That's how he and his colleagues at Fagan Financial Group of Raymond James view investing. It's an ongoing process, he says, and you have to be disciplined. His understanding of pacing and the long view make him a well-qualified partner for anyone planning for their financial future.

Really, that's just one thing that qualifies him. Others are his nearly 30 years in the business, his experience as a broker at a major firm, and now his alliance with Raymond James.

That's a good fit for him, which makes it a good fit for his clients. Fagan, Senior Vice President-Investments for Fagan Financial Group, says Raymond James offers a full complement of products, which he is free to offer as befits the client's needs. "The firm knows I work for the client," he says. "So my sole focus is to act in the client's best interest. What I like about Raymond James is that it truly is client-first."

Fagan and his team, Financial Advisor Charles M. Fagan, CRPC® and Senior Registered Sales Associate Linda K. Rhoades, get to know their clients and what's important to them. It's a four-part process. Part one is meeting with the client to better understand who they are and what they hope to accomplish. "The relationship is important to us," Fagan says. "We want clients to feel they can ask us anything, financial or

otherwise." Second is analysis of the client's current financial situation. Part three is Fagan Financial Group's recommendations, which are tailored to the client's specific needs and goals. Finally, part four, they continuously monitor the entire portfolio to make sure it's on track. "Every client is different," Fagan says, "so every portfolio's different. We structure it individually for each client."

The group stays in touch with clients via phone calls, newsletters, its website, quarterly reports and face-to-face meetings. His vast experience assures people that Fagan has seen the spectrum of financial conditions – bull and bear markets, high and low interest rates. "They know I'm going to be there to answer their questions."

The investment as a long-distance race metaphor is apt. "You're going to run into hills and you're going to run into various conditions. Whether it's hot, cold, windy or rainy, you make adjustments and keep moving forward," Fagan says. "Reaching your financial goals is similar. There will always be changing economic and market conditions and you make adjustments to stay on track."



Charles M. Fagan, John M. Fagan and Linda K. Rhoades



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