Professional Profile for Terry Nelson

Terry Nelson

http://hometownfp.com

Saint Paul, MN, 55113

Telephone: [651] 638-9428

My Business Philosophy

"My business philosophy is to provide a small number of clients with the highest level of PERSONAL financial advice and service possible, helping them successfully achieve their financial goals and dreams.

Because I truly care about my clients, I always put their interests above my own. Therefore, my goal is to be the best financial advisor I can be for each individual client!

My Education(Terry Nelson)

My degrees or years of college are:

- College for Financial Planning (Masters Degree)
- MN State Univ. (BA Finance Major)
- College for Financial Planning (CFP)
- Chippewa Valley Comm. College (Law Enforcement)

Financial Services

I have the following years of financial services experience:

- 23

I provide the following types of financial planning services:

- CFP® (Certified Financial Planner)

Other: Masters Degree in Financial Planning

I currently hold the following active securities licenses:

- Series 65 - Act as an investment advisor for fees

My CRD or IARD number is:

- 115065

My financial registration and fiduciary status is:

- I am an Investment Advisor Representative

You can view my compliance record for financial services and products by going to www.finra.org and entering my CRD or IARD number. If no record appears, go to my state's securities commissioner website and enter the same number:

- http://www.finra.org/Investors/ToolsCalculators/BrokerCheck/index.htm

I provide the following planning services:

- Financial Planning
- Retirement Planning
- Investment Strategy
- Current Plan Reviews

Other: Portfolio / Investment Management is my Specialty

I provide the following types of non-discretionary investment advice and services:

- Investment Strategy & Policy
- Asset Allocation
- Risk Management
- Performance Measurement
- Tax Efficient Strategies
- Current Portfolio Reviews

My minimum asset requirement for investment advisory or money management services is:

- $500,000

My minimum net worth requirement for planning services is:

- $250,000

My primary professional association memberships include:

- Certified Financial Planner Board of Standards
- Financial Planning Association
- Financial Industry Regulatory Authority (FINRA)

Business Practices (All Professionals)

My methods of compensation are:

- Fixed fee

I provide services to remote clients over the telephone and Internet

I provide the following types of information services:

- Monthly reports
- Market Letters

I generally respond to client calls or emails:

- The same business day (If call or email is received in the AM)

Certification:

I certify all of the information in this professional profile is complete, accurate, and up-to-date.

Professional: Terry Nelson

Most Recent Update: October 30, 2008