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| Mike Jacobson  Focus Financial  Starter  4/13/22 | 1. Home 2. Services 3. About Us 4. Mission Statement 5. Mike Jacobson Biography 6. Our Process 7. Contact Page |

**Page 1- Home**

**Doing What’s Right By You, For You:**

Live is worth living, and a lack of planning shouldn’t have to get in the way of that. At Focus Financial, we can help you build assets for a stable income during retirement – all while enjoying life along the way.

**Line Strip:**

Your financial goals are our priority – when you succeed, we succeed.

We believe that a well-rounded portfolio should consider the inclusion of stocks, bonds, mutual funds, ETFs, and annuities – and if you’ve saved and built a nest egg, we can help you to position them to reach your goals.

**Getting Started:**

At our Discovery Meeting, we can get a good sense of where you’re starting out. From there, we can work through establishing your financial plan.

**Our History:**

Since 1993, we’ve been helping people feel comfortable and confident in their financial decisions.

**Our Values:**

We want you to know that we’re invested in you. All our clients are invaluable and deserve the best experience we can provide.

(*CSC Notes:*

Picture at the home page more retirement-focused (a couple or a single older woman, maybe with grandkids)

Redo the video from the old website to put on the “About” page on the new website – take off of the “Home” page

Also reference <https://layton-focusfinancial.com/> – make a note to Caleb)

**Page 2- Services**

**Financial Planning:**

We offer holistic finance management services to ensure that you have all your bases covered when it comes to your financial future.

Our complete services include:

* Personal financial planning
* Portfolio analysis and asset allocation
* Investment management
* Insurance applications
* Tax planning
* Estate planning
* Ongoing progress reporting

We will tailor our services to best fit your financial needs in any capacity. As our relationship with you expands, we gain a better understanding of exactly how we can mold our work to help you.

We’re happy to answer any questions pertaining to the services that we provide. Click on the links below to notify us that you’d like to discuss these topics:

* I’m considering refinancing my mortgage.
* How do I handle my benefit changes now that I’ve changed jobs?
* When should I begin to take social security income?
* I’d like help determining which IRA investments may best fit my situation.
* I have some extra money and want to know if I should pay off my debt or invest it instead.
* What are some of the best practices for protecting my retirement accounts while still allowing them to grow?

**Page 3 - About Us**

At Focus Financial, we only have one focus – to help you achieve your goals, whatever they may be.

Insert Mike’s biography here

**It’s All About You:**

We want to find the solutions that are the best fit for you and provide ongoing service for years to come. We will provide you with ideas that you can use now to help you to achieve your goals.

We want to help you develop, implement, and monitor a strategy that’s designed to address your individual situation. If you’d like to learn more, we’d love to hear from you.

*(CSC Notes:*

Change “Meet the Team” to “About Mike” )

**Page 4 - Mission Statement**

**How We Work:**

We believe that everybody should have the opportunity to develop a comprehensive financial plan. It all begins with getting a handle on your starting point – finding out what you own and what you owe. You don’t have to do it alone – we’re here to help you figure out your financial picture!

From there, we can help you determine the most important strategies and product applications designed specifically for you. We’ll factor in your personal risk tolerance and your time horizons to analyze which solutions work best for your situation. From the beginning, we’ll give you the resources you need to make informed, careful decisions so that you can focus on the most important things in your life. If you have any questions about how we work, please fill out the form below and we’ll be happy to address your concerns.

**Line Text:**

We’ll help you get to where you want to be in your financial future.

**Our Process:**

Data gathering, analysis, financial planning discussion, strategies, implementation, and ongoing reviews.

**Our History:**

For decades, we have been serving clients to help them feel secure with their money decisions.

**Page 5 - Mike Jacobson Biography**

Mike Jacobson has been in the finance industry for over thirty years. He joined Focus Financial in 1996 and specializes in personal financial planning, investment management, insurance applications, 401k plan management, and employee education. He believes that small, positive steps can result in major positive changes in life, and he is eager to help clients take those steps.

Mike got his BA in Psychology from St. John’s University in 1983. He earned the Accredited Asset Management Specialist (AAMS®) designation from the College of Financial Planning in Denver in January 2007. He has also completed the Series 7, 63, 65, and 66 exams in securities and insurance.

While Mike is a Rochester native, he also spent a significant amount of his life in Hutchinson. He currently lives in Bloomington with his wife, Terry, and his rescue dog, Roscoe. Together, they have two children and five grandchildren. Mike is also a part of multiple men’s ministries in several local churches and has organized fundraising events for charities such as Union Gospel Mission and VEAP. In his free time, he enjoys fishing, hiking, playing cribbage, and spending time with his family.

**Page 6 - Our Process**

Our clients each go through a careful and comprehensive process for them to make the most of their financial future with the help of our team.

**Discovery Meeting:**

At our initial meeting, we want to spend some time getting to know you and your goals, needs, and concerns. From there, we can consider the following questions together:

* What do you want to accomplish in life?
* Do you have any financial goals that you’re already working towards?
* What financial issues may be unique to your personal situation?

These questions give us a good sense of where you’re starting out. After that, we can begin working on developing your financial plan.

**Plan Development:**

The next meeting is where we flesh out your plan and form the next steps in your financial future. After a review of our discussion from the Discovery Meeting, we can assess what levels of support you will need in various areas of your financial picture and then create a plan to fulfill that need.

**Recommendations Meeting:**

After a quick review of what we discussed in the previous meetings, we will present our recommendations. These recommendations are based on our decades of expertise in the industry and are tailored to your situation. We’ll also answer any questions you may have and start discussing the next steps in the strategy.

**Ongoing Progress Updates:**

Developing an ongoing conversation with you is the best way that we can understand what you want for yourself. Along with your annual financial review meetings, we will also send regular progress updates to fill you in on your progress and appropriate adjustments based on changes in your situation and in the investment markets, tax policy, and the economy so that you can continue on the right path towards your goals.

**Strategic Partnerships:**

We believe that strategic partnerships can only further enhance the assistance we bring to you. It’s all about providing you with the best resources to make you feel secure in your financial future. Please ask us about the recommended tax and estate planning professionals who would be happy to help you.

(*CSC Notes:*

Take references in Strategic Partnerships and their hyperlinks from the old website)

**Page 7 - Contact Us**

We want you to know that we’re available for you whenever you need us. Because we believe that accessibility is one of the most vital things that we can offer our clients, our schedule is flexible to when you’re ready to meet. You don’t even have to come to the office – we are proud to offer our services face-to-face and virtually at your convenience. Give us a call or fill out the form below to set up an appointment so that we can get started on working towards your dreams.

(*CSC Notes:*

Take out Saturday/Sunday completely

Entire schedule is by appointment – take the hours out, by appointment only

Personalization blurb above “Minneapolis Office”)