



*Financial Planning*  
*Retirement Planning*  
*Estate Planning*  
*Education Planning*  
*Insurance & Annuities*  
*Trust Services*  
*Private Client Services*  
*Equity Investments*  
*Fixed Income*  
*Global Wealth*  
*REITs*

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# Full Service Financial Planning + Investment Services

## Your Goals + Our Expertise

In our experience, our clients are concerned with their investments and accounts mostly as a vehicle to attain their goals and dreams. As professional Financial Consultants, it is our job to help our clients pursue their objectives so they can live their dreams. We believe it is imperative to take the time needed to understand these goals so that we can work together towards the future you have planned.

Our firm believes it is important to have a philosophy that directs our investment recommendations. One of the most basic tenets of this philosophy surrounds our commitment to help protect your hard earned money while working together to grow it.

## Solid Resources + Personal Attention

Lisa's partnership with Investment Professionals, Inc. leverages more than 17 years of working with their clients and more than \$4.2 billion under management to help you reach your specific goals. Because our practice is part of a full-service financial firm, we can bring to bear our separate and distinct knowledge in areas of concern to you.

At each stage of the process we welcome you to consult us to answer any questions, concerns, or ideas you may have. In addition, you can access our experienced and knowledgeable back office staff including our retirement, insurance, trust, estate, stock market, and fixed income experts.

## Corporate Strength + Individual Commitment

Whether your needs center around your personal goals or involve larger corporate business transactions, we look forward to bringing to bear the resources and experience you will need.

All Securities and Advisory Services offered through Investment Professionals, Inc. (IPI), a Registered Broker/Dealer & Registered Investment Advisor and member FINRA & SIPC. The investment services offered by IPI are in no way affiliated with or offered by the bank or credit union where IPI may maintain an office. Customers work solely through IPI with respect to their investment, brokerage and securities transactions. The products offered by Investment Professionals, Inc. are not insured by the FDIC, the NCUA or any other agency of the government, are not deposits or other obligations for the bank or guaranteed by the bank and involve investment risks, including possible loss of principal amount invested.

## About Us

### Lisa Wilson

Lisa Wilson, Financial Consultant, offers clients more than a quarter century of experience in finance and economics. She's been recognized by peers and clients for her clear and effective communication style and for her ability to translate seemingly complex topics into easy-to-understand language.

Lisa is a former economics instructor with a passion for sharing her knowledge and empowering clients through education and understanding. She has dedicated the past 25 years to financial services and teaching at the college level. Her practice centers around financial planning and preparation for retirement, higher education, estates and trusts using a combination of insurance and investment products.

Lisa is considered by many to be a personable, approachable and hard-working individual. She thoroughly enjoys the rewards of philanthropy, continually striving to contribute to and advance her local community. When she's not serving clients, Lisa enjoys sports, gardening, music and reading. She and her husband have two beautiful children. They value the importance of both their immediate and extended families.

Lisa graduated from Fort Hays State University with a Bachelor of Science degree in Business Administration coupled with a concentration of graduate hours in Business Education. She holds a Series 7, 66 and 31 license.

### Investment Professionals, Inc.

Investment Professionals, Inc. (IPI), has been ranked the Most Highly Rated Bank Brokerage Firm<sup>1</sup> in the nation and has won more #1 category rankings<sup>1</sup> than any other firm as reported by American Brokerage Consultants. Citing the same authoritative industry wide research study, IPI continues to be ranked number #1 in Customer Service, Quality of Training and Accuracy & Ease of Processing; all important attributes of a solid firm. As a client, you will have access to IPI's full team of experts, including financial and retirement planning, insurance and annuities, stocks, fixed income, estate planning, and trust services.

Source <sup>1</sup>: 1997 through 2007 national "Studies of Bank Brokerage & Retail Investment Services" conducted by American Brokerage Consultants (ABC), St. Petersburg, FL. In the most recent 2007 study, a total of 1,872 banks offering retail investment programs were surveyed including banks offering IPI and competitor investment programs -- which represents a 21% sampling and 68% of all bank assets according to ABC. A total of 15.3% of banks surveyed responded to the 2007 national survey. Individual banks were asked to rank their specific investment program in the ABC survey; responder results were aggregated and compared against the results of all brokers dealers in the survey. Past ranking performance may not be indicative of future ranking performance. IPI has been honored with the #1 ranking in three out of the most recent four surveys conducted by ABC.

NO BANK GUARANTEE | NOT FDIC INSURED | MAY LOSE VALUE



**Lisa Wilson**  
*Financial Consultant*



**William Edwards,**  
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