

MEDIA KIT
FOR
IAM FINANCIAL, LLC



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Background

After 11 years in the business, Richard T. Feight, CFP, noticed that financial planning was more driven by product than process. Nobody was teaching good financial habits to their clients. They sold products, or suggested investments, but didn't actually teach people how to build wealth and grow their net worth. This may be because they did not know themselves. Many financial advisors drive fancy cars, spend money lavishly, and could not afford to retire if they wanted to. Furthermore, they do not always have the clients' best interest in mind.

In 2008, IAM Financial was created with a mission to

Change the way the world thinks about money.

We help clients organize their finances so that they can retire on time. Offering affordable, fee-only, comprehensive financial planning, we teach clients to use simple, fundamental planning strategies such as:

- Pay Yourself First
- Live Debt/Stress Free
- Succeeding to Plan is Planning to Succeed

...and investment strategies such as:

- Low Expense Investing
- Buy & Hold (Not Market Timing)
- Reducing Volatility (Asset Allocation)

Richard T. Feight, CFP®



Biography

Among independent financial advisors, Mr. Feight is one of the most well known and highly respected “Fee-Only” financial planners. Rich has dedicated his career to offering low cost “Fee-Only” comprehensive financial planning and investment advice. Rich assists his clients in developing financial planning strategies using low expense investment models to accomplish their goals. He specializes in helping his clients organize and simplify their finances so that they can retire on time.

In December of 2007 Rich formed IAM Financial to better serve clients looking for objective, affordable, independent advice. Prior to this, Mr. Feight was an investment advisor representative of Creative Financial Design, where he was responsible for the selection of securities used in, and management of, asset allocation portfolios for numerous client accounts. His career began as a registered representative of Vestax Securities Corp., where he was a fee-based advisor. Rich was also licensed in the state of Michigan with Jackson National Life to advise and sell life insurance.

Rich is a graduate of Michigan State University where he received his degree in Finance. Rich has earned the Certificate of Financial Planning from The College for Financial Planning in Denver, Colorado, that was comprised of intense graduate level classes grounding him in the various foundations of financial planning. He is a CFP® (Certified Financial Planner®) meeting the experience, education requirements and passing the two-day, 10 hour exam, making him one of the few in the country who hold the designation. Rich subscribes to the stringent and mandatory annual educational hours, experience, and code of ethics to meet the requirements to be a NAPFA Registered Financial Advisor. Out of the 800,000 individuals in the country who claim they are financial advisors/planners, fewer than 1,300 in the country qualify for the membership; Rich is one of them.

Rich is the President of the Financial Planning Association (FPA) of Michigan. The FPA of Michigan is one of largest and influential chapter in the country. Rich was recently named Vice President of Membership for Transportation Toastmasters Club 4776 downtown Lansing. He has been quoted in both local and national media from Noise Magazine to CNBC, and industry news publications such as Investment News and Financial Advisor Magazine. Rich enjoys public speaking and has spoken at industry educational meeting, high schools, and executive investment clubs, AARP conferences, and business educational seminars. Rich views his role as a Fiduciary for his clients as the single biggest key to any planning relationship and strives to provide the most competent, unbiased and objective advice in the financial planning profession today.

Fact Sheet

- IAM Financial is a registered investment advisory firm registered with the State of Michigan.
- Richard T. Feight, CFP was awarded the Certified Financial Planner's Certificate from the Certified Financial Planner Board of Standards on September 24th, 2001.
- Richard T. Feight, CFP became a Registered Financial Advisor for the National Association of Personal Financial Advisors and began offering fee-only financial planning in January 2003.
- Richard T. Feight, CFP is the current President of the Financial Planning Association (FPA) of Michigan, one of the largest most influential FPA chapters in the country.
- Richard T. Feight, CFP has been interviewed and quoted in local and national media on personal finance, budgeting, and successful investing. An abbreviated list from 2008 include:
 - October 22nd, interviewed by Alison Himelhock of WLNS Channel 6 Lansing on stock market conditions.
 - August 12th, appeared on CNBC's On The Money with Carmen Wong Ulrich.
 - July 28th, quoted in Lisa Shidler's Investment News article "When it comes to investing, youth is no handicap."
 - March, quoted in Financial Advisor Magazine David Drucker's article entitled "Hidden Threat: Identity Theft".
- Richard T. Feight, CFP has spoken to numerous industry and public events on personal finance, organizing your finances, retiring on time, and keys to successful investing. An abbreviated list from 2008 include:
 - December 4th, "Personal Finance 101" at MWI Veterinary Supply in Holland, MI.
 - October 14th, "The Basics of Managing You Money in Today's Economy" at American Express Travel in Dearborn, MI.
 - June 24th, "Work at 50+" at Steelcase AARP Conference in Grand Rapids, MI.
 - February 28th, "Estate Planning, Business Planning, and Financial Planning, A Case Study" for the Financial Planning Association of Michigan, Bloomfield Hill, MI.
- Richard T. Feight, CFP volunteered for Kiplinger/National Association of Personal Financial Advisor Jumpstart Your Retirement Hotline for the third consecutive year.
- IAM Financial donated 10% of profits via www.charitygiftcertificate.org on behalf of clients, family and friends to various charities including Alzheimer's Association, American Cancer Society, American Diabetes Association, American Red Cross, Make-A-Wish Foundation America, March of Dimes, Meals on Wheels, Nature Conservancy, PBS, Sierra Club, United Way, and Wildlife Conservation Society, to name a few.
- IAM Financial has been given the Green Star Award by Meridian Commercial Recycling Group in recognition of their recycling efforts.