

Integrated, Comprehensive Financial Planning with a National Presence

**SOCIUM ADVISORS DELIVERS
COORDINATED, ALL-INCLUSIVE
FINANCIAL PLANNING WITHIN A
COLLABORATIVE CLIENT
PARTNERSHIP.**



Michelle Magner, Vice President, and Scott Underwood, Founder and CEO

The financial professionals at Socium Advisors believe strong financial plans impact all facets of their clients' financial lives, from outcome-based planning to risk management, asset distribution to estate planning.

"What we do is like building a house," says Scott Underwood, Founder and President. "Homeowners know what they want, and they know what's important to them. But they also know they have to rely on experts like architects and contractors to create a blueprint and build a solid structure."

Michelle Magner, Vice President, notes that the financial plans—or financial blueprints—Socium creates for clients are truly the foundation for all they do. "Co-authoring a financial plan comes first; only after that roadmap is in place do we make insurance or investment recommendations to help clients achieve their goals," she explains.

PARTNERING WITH CLIENTS AND EACH OTHER

"Socium" means *partner* or *ally* in Greek, and that's exactly what the firm strives to be with clients. "We build partnerships with clients who want to be engaged in the process so that we can hold each other accountable," says Magner.

The firm's value proposition lies in properly planning and organizing products

so that each client's accumulation phase looks better along the way. As life evolves, client plans are reviewed and modified to help keep goal achievement on track.

"Our clients trust us with the responsibility of stewarding their families' financial future—from big-picture issues like tax efficiency and asset distribution to smaller things like buying a car," says Underwood. "Our team takes that stewardship seriously."

Together, the Socium team possesses more than 120 years of combined financial services experience, as well as a plethora of professional designations, including CERTIFIED FINANCIAL PLANNER™, Chartered Financial Consultant®, and Retirement Income Certified Professional®, all of which demonstrate a depth and breadth of knowledge beneficial to their clients.

"Our team is larger than average, affording us the ability to work together in helping clients succeed in reaching their goals," says Magner. "Leveraging our team members' various areas of expertise allows Socium to ensure the most appropriate solutions and strategies are identified for clients."

That collaborative mindset doesn't end at the Socium offices, either.

"We routinely partner with the other trusted advisors in our clients' lives," Magner emphasizes. "Tax advisors, estate attorneys, accountants—each gives their

best advice as it pertains to their area of expertise. Socium Advisors is skilled in synthesizing all of that information into the plans we develop."

Underwood concurs. "Our comprehensive, product-agnostic approach to financial planning results in clients getting the best of all worlds: financial planning, investment planning, wealth accumulation strategies, insurance planning, and more."

BENEFITS OF A NATIONAL NETWORK

Though located in St. Louis, Socium Advisors has affiliate Northwestern Mutual advisors in Dallas, Little Rock, Louisville, Columbus, Tampa, and Washington D.C. The network provides a robust infrastructure and a diversity of skill sets, all delivered with the common vision of providing comprehensive, integrated financial planning.



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