

Fact Finder Questionnaire

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A

BUSINESS INFORMATION

Please fill out completely so we have all of the necessary information for your OnDemand Seminar System.

YOUR NAME (As it appears on your business card)

Gabriel Fancher, MBA, MA

COMPANY NAME

The Financial Group

COMPANY ADDRESS

1950 Old Fort Pkwy Murfreesboro

TN

37129

CITY USA

STATE/PROVINCE

ZIP/POSTAL CODE

COUNTRY

WORK PHONE

615-225-6159

CELL PHONE

615-445-5073

TOLL-FREE NUMBER

888-886-2265

FAX

615-225-6151

EMAIL ADDRESS (We have room to include up to 2 email addresses)

EMAIL 1

Gabe. Fancher@RaymondJames.com

EMAIL 2

WEB SITE(s) (We have room to include up to 3 web addresses)

www.

In Murfreesboro.com

www.

401K Rollover Teacher.com

www.

BROKER/DEALER

Raymond James Financial Services

YEAR STARTED IN BUSINESS

2001

PROFESSIONAL TITLES (List all titles you hold: i.e. Senior Vice-President Investments)

1 Financial Advisor

2

3

DESIGNATIONS HELD (List all designations held: i.e. CFP® - CERTIFIED FINANCIAL PLANNER™)

1

2

3

Note: Please list the initials (Ex: CFP®) and also spell out exactly what the designation stands for.

EDUCATION (List all degrees you hold.)

College/University

Degrees Obtained

1 Western Kentucky University → BA Economics

2 Middle Tennessee State Univ. → MBA Finance

3 " " " " → MA Econ

INDUSTRY HONORS & AWARDS (Ex: Chairman's Council)

1 2013 Ruthie Favorite Financial Planner

2

3

Fact Finder Questionnaire

Gabriel Fancher

YOUR NAME

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MILITARY SERVICE / MEDALS

- 1
- 2
- 3

B

BUSINESS FOCUS

AREAS OF SPECIALIZATION

Please enter a maximum of 4 areas of specialization that you focus on in your business. Please rank them in order of importance, with 1 being the most important. An example is provided below (28 characters maximum per Area):

- 1 Retirement Planning
- 2 College Savings
- 3 Income
- 4 Estate Planning

EXAMPLE

- 1 Retirement Planning
- 2 Estate Planning
- 3 Succession Planning
- 4 Long-Term Care

TYPICAL CLIENTS

Please enter a maximum of 4 types of clients that you serve and want to focus on in your business. Please rank them in order of importance, with 1 being the most important. An example is provided below (28 characters maximum per Area):

- 1 Mass Affluent
- 2 Small Business Owners
- 3 Retirees
- 4 Dave Ramsey Fans

EXAMPLE

- 1 High Net-Worth Individuals
- 2 Retirees
- 3 Professionals
- 4 Small-Business Owners

MISSION STATEMENT

Help my clients make better financial decisions by helping them figure out where they are financially and where they want to be, we then create a plan that fits their individual needs and guide them through the completion of that plan year after year.

C

PERSONAL INFORMATION

See [linkedin.com/in/gabriel-fancher](https://www.linkedin.com/in/gabriel-fancher)
[facebook.com/gabriel.fancher](https://www.facebook.com/gabriel.fancher)
[gabriel-fancher.com](https://www.gabriel-fancher.com)

COMMUNITY SERVICE / CHARITABLE / CHURCH ACTIVITIES

Ex.: Rotary

- 1 Diplomat at Chamber of Commerce
- 2 Volunteer at Journey Home
- 3 Alzheimer's Association Middle Tennessee
- 4 First United Methodist Church Lay Delegate, Usher
- 5 ~~Rutherford County GOP~~

D OnDemand Seminar

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DOMAIN NAME

We will be purchasing and setting up your own dedicated cloud server and domain name for the hosting of your OnDemand Seminar System.

EXAMPLE: If your name was: Anthony Hart
Investing With Hart, LLC

TO PROMOTE YOU, YOUR DOMAIN NAME MIGHT BE:

www.anthonhartpresents.com

TO PROMOTE YOUR COMPANY, YOUR DOMAIN NAME MIGHT BE:

www.investingwithhartpresents.com

WHAT WOULD YOU LIKE YOUR DOMAIN NAME TO BE?

www. Gabe Fancher Presents. com

EMAIL ADDRESS

We will also be setting up an email address to handle all notifications from your OnDemand Seminar.

What email address would you like to set up?

(EXAMPLE: anthony@anthonyhartpresents.com)

EMAIL NAME

Gabe @ GabeFancherPresents.com

SOCIAL MEDIA

We would like to include all of the links to any of your social media pages on the Contact Us page.

Please print clearly and enter your web address to your social media pages below:



[www.facebook.com/ Fancher Financial Advisor](http://www.facebook.com/FancherFinancialAdvisor)



[www.twitter.com/ Gabriel Fancher](http://www.twitter.com/GabrielFancher)



[www.linkedin.com/ in/ Gabriel Fancher](http://www.linkedin.com/in/GabrielFancher)



www.plus.google.com/



www.youtube.com/



[www.pinterest.com/ gabriel fancher](http://www.pinterest.com/gabrielfancher)

BLOG

www. the financial group.blogspot.com



Disclaimer Info

PLEASE PRINT

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BROKER / DEALER DISCLAIMER

Please enter the disclaimer information you need to appear in your OnDemand Seminar.

Example: Securities and advisory services offered through LPL Financial, member FINRA / SIPC. The LPL Financial representative associated with this website may discuss and/or transact securities business only with residents of the following states: AZ, CA, CO, DE, GA, IL, MA, MD, MN, MO, MS, NV, OH, PA, RI, SC, TN, TX, VA, WA, WV.

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The Financial Group, LLC and Southern Community Bank are independent of Raymond James.

Disclaimer above continued...

~~DESIGNATION DISCLAIMER~~

Example: Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and CFP® in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Raymond James financial advisors may only conduct business with residents of states and/or jurisdictions for which they are properly registered. Therefore a response to a request for information may be delayed. Please note that not all of the investments and services mentioned are available in every state. Investors outside of the United States are subject to securities and tax regulations within their applicable jurisdictions that are not addressed on this site. Contact your local Raymond James office for information and availability.

STATES REGISTERED IN

Please circle the States you're registered in:

AL	AR	CT	GA	IL	KS	ME	MI	MO	NV	NM	ND	NM	OR	SC	TX	VA	WI
AK	CA	DE	HI	IN	KY	MD	MN	MT	NH	NY	OH	NY	PA	SD	UT	WA	WY
AZ	CO	FL	ID	IA	LA	MA	MS	NE	NJ	NC	OK	NC	RI	TN	VT	WV	

