

NOLAN BAKER, PERSONAL CHIEF FINANCIAL OFFICER



THINK FOR A MINUTE ABOUT THE PERSONAL WEALTH YOU HAVE CREATED SO FAR. IT CAN HAVE A HUGE IMPACT ON YOUR LIFE, COMMUNITY, AND LOVED ONES - IF YOU TAKE THE RIGHT STEPS TO MAKE SMART DECISIONS ABOUT YOUR FINANCES.

COORDINATING ALL THE AREAS OF YOUR FINANCES TOGETHER CAN SEEM OVERWHELMING. IMPORTANT TASKS AND UPDATES DON'T ALWAYS GET DONE. OR WORSE, COMPLEX ISSUES YOU DON'T KNOW HOW TO ADDRESS NEVER GET TAKEN CARE OF.

THE SOLUTION? A PERSONAL CFO - A LICENSED AND REGISTERED PROFESSIONAL, WITH DECADES OF EXPERIENCE, WORKING AS A FIDUCIARY TO HELP YOU FOCUS ON YOUR PERSONAL FINANCIAL LIFE HEALTH BY ADDRESSING KEY FINANCIAL ISSUES YOU COULD BE FACING.

Nolan Baker started his career in financial services in 1994 and is an investment advisor representative and fully licensed agent. He received his associate degree in financial management technology from Owens Community College in 1998. Over his career, Nolan has defined his role as an investment professional by focusing on retirement planning, including distribution of retirement savings, transitioning into retirement, asset reallocation, estate and legacy planning, and multi-generational plans.

Nolan has dedicated his career to helping protect the financial freedom of retirees. As an advocate for education in his community, Nolan holds educational workshops on the importance of having a strategic plan for retirement and the dangers of an underplanned retirement. His unique approach to comprehensive financial planning comes from the structure he learned during his military training. He implements a custom approach, specific to each of his client's goals. Coined as his Independent Income System, Nolan accounts for the expected and unexpected variables of retirement and then develops a strategy alongside his clients for a more successful retirement.

Nolan has been acknowledged as a leader in the Toledo area for his commitment to his clients, profession, and community. He was a top three finalist of the 2011 Torch Award for Marketplace Ethics from the Better Business Bureau and nominee for the 2006 Toledoan of the Year award and the 2011 Top 20 Under 40 award.

Nolan is married to his school sweetheart, Karen. They live in Waterville, Ohio, with their two boys and enjoy traveling, Boy Scouts activities, and hockey. Nolan is an active Cubmaster in Cub Scouts, and Karen is president of the Waterville Parents Association. Karen also helps Nolan with operations and events at America's Retirement Headquarters. The perfect winter weekend for the Bakers is watching their two boys play youth hockey at BGSU. They attend Cedar Creek Church in Whitehouse, Ohio.

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PROFESSIONAL POSITIONS:

- **Licensed Agent** – February 1994
- **Investment Advisor Representative** – June 1997

COMMUNITY PROGRAMS AND FEATURED SPEAKING ENGAGEMENTS:

- **Boy Scouts of America** – Cubmaster, Pack 101, Waterville, Ohio: 2015 – Present. Erie Shores Council: 2006 and 2007 Northwest District Finance Chairman.
- **Junior Achievement** – Sponsored high school students to teach them how to set up and run a successful business: 2002 – 2007.
- **Speaking Events** – Senior Market Advisor, Senior Market Expo National Speaker, Las Vegas, Nevada: August 2009, 2010. National Business Institute, Presenter: May 2009. Ohio Education Association Mega Conference, Speaker: February 2009, April 2009 (Presented to 200 attendees). WE2 Investment Advisory Group, Investment Advisor Representative meeting, Tampa, Florida: February 2010 (Presented to 100 financial professionals). Center for Successful Aging, Medical University of Ohio/Area Office on Aging, Kickoff Speaker: November 2006. Area Office on Aging, Keynote Speaker, “The Cost of Caregiving”: September 2007 (Presented to 220 Attendees). Toledo Board of Realtors: October 2008. Other Speaking Events: Monclova Senior Center, Bryan Senior Center, Montpelier Senior

Center, Lymann Liggins Senior Center, J. Ford Senior Center, Monclova Community Center, Adult Retiree Center, Lucas County Recreation Center Senior Citizens Day, Community Development Center, James Hancock Senior Center, COSI Senior Day, Central Park West, Maumee Senior Center, The Pinnacle, National Educational Conference, NFISCO Summer Gala, 4Ward Marketing Challenge.

FINANCIAL TALK SHOWS:

- “Retirement Guys Radio Show” – Saturdays at 1 PM on 1370 WSPD, Toledo, Ohio: 2003 – 2017.
- “Money Talks” – Weekly on 1230 WCWA AM, Toledo, Ohio. Financial Radio Show Co-Host: 2000 - 2001.
- “Money Talks” – Weekly on 1330 WFIN AM, Findlay, Ohio. Financial Radio Show Co-Host: 2000 - 2001.
- “The Nolan Baker Show” – Weekly on 1520 WQCT AM, Bryan, Ohio. Financial Radio Show Host: 2002 - 2003.
- “Wealth Management Wednesday” – Weekly on 1230 WCWA, Toledo, Ohio: 2003.
- “The Morning News Show” – The second Wednesday of every month on 1520 WQCT, Bryan, Ohio: 2004- 2006.



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FEATURED PUBLICATIONS AND INTERVIEWS:

- **The Toledo Free Press** – Weekly columnist for Lucas and Wood counties' largest weekly newspaper with a 100,000 circulation: October 2008 – January 2015.
- **Senior Market Advisor Magazine** – Contributed to several columns over the years. Featured as the cover story, "The New Wave of Advisors": November 2009.
- **Boomer Market Advisor Magazine** – Featured on pages 24 and 25 discussing advanced investment vehicles: August 2009.
- **The Toledo Blade** – "Savings Security," Cover story in the Living section: Sunday, January 26, 2014. "Retirement strategy needs sharper focus," Front and second pages of the Business section: Sunday, May 30, 2004.
- **Suze Orman Interview** – Cover story for The Toledo Free Press: February 2010.
- **The Bryan Times** – Featured speaker at the Bryan Senior Center, People in The News section: Tuesday, November 16, 2004.
- **The Bryan Times** – Featured speaker at the Montpelier Senior Center, Community Calendar: Tuesday, February 1, 2005.
- **Homes 4 Sale by Owner Network Magazine** – Focus on Finance with Nolan: July 2006.
- **NEXT News** – "Why I'm Next": Summer 2006. "Mastering the Media": Summer 2010.
- **USA Financial** – National Field Marketing Organization, Winners Circle audio CD series.
- **WTO5 Toledo's CW** – "9 Little-Known Money Traps": March 2007.
- **Buckeye Cable** – "Step Up Toledo": August 2007.
- **WTOL Channel 11** – "Your Saturday Morning News": August 2008, October 2009. 6 PM and 11 PM nightly newscast: July 2010. Evening newscast: December 2013,
- **Better Living** – NBC 24.

MILITARY SERVICE:

- **The United States Marine Corps Reserve:** Electrician, Generator Operator, and Rifleman: June 1994 – November 1998. Honorable discharge.

EDUCATION/ACCOMPLISHMENTS/MEMBERSHIPS:

- Honorable Mention, Best Rising Star: 2013 National Underwriter Industry Elite Awards.
- The Better Business Bureau Torch Award for Marketplace Ethics for Northwest Ohio: 2011 and 2013 Top Three Finalist.
- Owens Community College Alumni Association: March 2012 Profile of Excellence.
- Owens Community College: 1996-1998; Associate of Applied Business in Financial Management Technology: 1998.
- Peak Reps LLC, Owner: September 2015 – present.

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