




Today's plan with tomorrow's vision




SCHEXNAYDER
WEALTH ADVISORS

 *Start with the end in mind*

 *Stay focused*

 *Simplify the concepts*

 *Service to our clients*

*"If you don't know where you're going,
you'll end up someplace else."*

—Yogi Berra



PLANNING TODAY FOR YOUR TOMORROW

Why do you need wealth management advice? Because we believe in the saying that some of the best days of your life haven't happened yet. Planning for your financial future means planning for the life you want to have and the legacy you want to leave.

It doesn't have to be an intimidating proposition. In fact, we want it to be pleasant. At Schexnayder Wealth Advisors, we set ourselves apart from other advisors by combining years of award-winning financial expertise with warmth and a sense of humor that actually make the planning process enjoyable. We pride ourselves on our long-term client relationships and on the fact that our business has grown thanks to referrals from satisfied clients. Our clients look forward to meeting with us as much as we look forward to meeting with them.

Our mission statement outlines our culture, our beliefs and our unwavering commitment to our clients.

We have a singular focus to be the most trustworthy and knowledgeable financial services firm in Southeast Louisiana.

We will place our clients' well-being ahead of any profit motive.

We will distinguish ourselves from competitors by going beyond our clients' expectations.

We will be diligent in providing investment advice and assisting our clients with all of life's wealth management issues.*

We will help our clients retire with dignity.



NO JARGON. JUST GOOD ADVICE.

We begin our relationship with you by having a frank conversation about your current financial situation, your financial goals and your tolerance for risk. Our most important tools at this point: our well-developed listening skills, the yellow pad we use to capture your thoughts, and a “pain assessment” scale that you’ve probably seen in your doctor’s office (we use it to have you show us concretely how you feel about risk).

We then translate what we hear into a wealth management plan that is customized specifically for you. Converting complicated data into language you can relate to is what we do best, so we explain our approach in a practical, logical way that’s easy to understand. Many advisors talk about maximizing returns, but our philosophy is to attempt to optimize your returns within your risk tolerance.

Once you’ve approved your plan, we begin to implement it and will meet with you regularly to make sure that the plan stays on track with your life changes. We can also coordinate with our network of skilled professionals who help you with your financial life; for example, our team is experienced in working with attorneys on items like wills and trusts. All along the way, we sweat the details so you don’t have to.

WHAT WE OFFER

Your customized plan is designed to help you pursue the wealth you want—and to preserve it once it's yours. We use eight critical wealth management issues as our framework.

- **Investment management*** starts with our conversation about your personal goals. This lets us create an investment strategy designed to meet your unique requirements and risk tolerance.
- **Cash-flow and debt management** means understanding how you spend your money, then making suggestions for improving your cash flow so you can maximize the amount you're able to invest* toward your goals.
- **Family risk management** is about identifying possibilities that could threaten your financial future and creating a plan to reduce them.
- **Retirement planning** can't begin too early. Your desired retirement age and the lifestyle you envision will drive our approach.
- **Education planning** for a child's or grandchild's post-high school education requires a look at the implications for your income, gift and estate taxes, as well as the student's ability to qualify for financial aid.
- **Legacy and estate planning** is one of our specialties. It can be an emotional topic, but it's important to make a plan—including wills and powers of attorney—to ensure that your wishes are upheld.
- **Business planning** includes creating strategies to protect your business, improve cash flow, minimize taxes, and more.
- **Special situations** or unexpected expenses can crop up anytime. If and when they do, we'll make sure you have a plan in place.



MEET OUR ADVISORS

Nolan Schexnayder, CPA, PFS OWNER, SENIOR ADVISOR Nolan@schexwealth.com

Born and raised in LaPlace, La., Nolan earned bachelor's and master's degrees in accounting at Louisiana State University (LSU). After a brief stint as an auditor and cost accountant in the petrochemical industry, he began practicing as a Certified Public Accountant (CPA) in 1979. He became a registered representative of HD Vest Investment ServicesSM in 1987 and earned the Personal Financial Specialist credential from the American Institute of Certified Public Accountants (AICPA) in 1997. He holds the AICPA's certificate of educational achievement in financial planning, a distinction earned by less than one-half of 1 percent of all CPAs nationally. Nolan is also a member of the Society of Louisiana Certified Public Accountants (LCPA). He holds securities licenses for Series 6 (Investment Company Products/Variable Contract Representative), Series 7 (General Securities Representative) and Series 63 (Uniform Securities Agent State Law Exam) with HD Vest Investment Services, as well as life, health, accident, and annuities insurance licenses. He is an Investment Advisory Representative (IAR) with HD Vest Advisory ServicesSM.

Nolan was named the HD Vest Financial Planner of the Year in 1999, and for two decades has been named a member of HD Vest's Premier Advisors' Forum, the firm's annual award of excellence recognizing its top 75 advisors across the country. He trains and mentors more than 50 HD Vest advisors in Louisiana and is a frequent speaker at many HD Vest conferences across the nation.

In 2014, Nolan received the Five Star Wealth Manager Award in New Orleans, an honor presented to wealth managers who satisfy 10 criteria associated with wealth managers who provide quality service to their clients.

Nolan has been an active volunteer with a number of civic organizations, including the Rotary and Lions Clubs of LaPlace, the LaPlace Centennial Committee and the River Region Chamber of Commerce; he is also a member of the board of the Mardi Gras Krewe of Carrollton. He is a past state chairman of the LPCA's Estate and Financial Planning Committee and its Insurance Committee. He enjoys spending time with his wife, Andie, and his family, cooking, photography, travel, reading, and cheering for his beloved LSU Tigers.

Jesse Duhon ADVISOR Jesse@schexwealth.com

A native of Gramercy, La., Jesse earned a bachelor's degree from LSU. He began his financial services career at Capital One Bank; his investment experience began with positions at Chase Bank and Iberia Bank. Jesse currently holds securities licenses for Series 6 (Investment Company Products/Variable Contract Representative), Series 7 (General Securities Representative) and Series 63 (Uniform Securities Agent State Law Exam) with HD Vest Investment Services, as well as life, health, accident, and annuities insurance licenses. He is an Investment Advisory Representative (IAR) with HD Vest Advisory ServicesSM.

Jesse is a member of the Mardi Gras Krewe of Carrollton and volunteers his time to help nonprofits that promote historic preservation, energy efficiency and urban cycling; he also assists his wife, Michelle, in her business that restores historic tombs, cemeteries, and mausoleums. In his spare time, Jesse enjoys sports, cooking Cajun food, music, and travel. He and Michelle live in New Orleans.





SCHEXNAYDER WEALTH ADVISORS

HOW HD VEST SUPPORTS US

FINANCIAL SERVICES REINVENTED—
SERVING ADVISORS WHO SERVE YOU

Since its inception in 1983, HD Vest Financial Services® has supported an independent network of tax and non-tax professionals who provide comprehensive financial services solutions, including securities, insurance, money management services, and banking solutions. Approximately 4,500 independent contractors manage over \$35 billion in assets for some 1.8 million individuals, families and small businesses in all 50 states.¹ We are one of the only broker-dealers with a focus on helping accounting professionals establish and grow financial services practices.

¹As of January 1, 2014



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We invite you to call us for a personalized, no-obligation consultation,
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Nolan Schexnayder and Jesse Duhon are Registered Representatives.

*Securities offered through HD Vest Investment ServicesSM Member SIPC, Advisory Services offered through HD Vest Advisory ServicesSM, 6333 North State Highway 161, Fourth Floor, Irving, Texas 75038 (972) 870-6000.

Schexnayder Wealth Advisors is not a registered broker/dealer or independent advisory firm.

Investments are subject to market risks including the potential loss of principal.

The HD Vest affiliated companies exclusively provide financial products and services, and do not provide or supervise tax or accounting services. Advisors may provide tax, accounting or other services through their independent outside businesses, but these services are separate and apart from HD Vest.