



## **MARK LOFTIS, CFP<sup>®</sup>, CLU<sup>®</sup>, ChFC<sup>®</sup>, AIF<sup>®</sup>**

**Investment Advisor Representative  
Financial Advisor**

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### **My Business Philosophy**

Preparing for that next step in life isn't always easy. New clients approach me with similar concerns: increasing demands on their time and resources prevent them from taking appropriate steps to make positive financial outcomes possible. I'll guide you through the team-based, process-driven approach to financial preparedness that has helped many of my clients. Often, my clients say the greatest benefit from our collaboration is the clarity and financial peace of mind they've come to enjoy as a result. Contact me today to learn how you may benefit from putting our team to work for you.

### **Professional Qualifications**

- Bachelor of Arts, Rhodes College (1994)
- Earned CERTIFIED FINANCIAL PLANNER™ professional (CFP®) designation
- Earned Chartered Life Underwriter (CLU®) designation
- Earned Chartered Financial Consultant (ChFC®) designation
- Earned Accredited Investment Fiduciary (AIF®) designation
- Court of the Table Qualifier (2018) and Lifetime Member of Million Dollar Roundtable
- Member of Financial Planning Association (2008 - present)
- Member of National Association of Insurance and Financial Advisors (1996 - present)
- MassMutual Special Care Planner (qualified to help people with special needs and their life care plan)

### **About Me**

I'm a long-time resident of Germantown, Tennessee where I live with my wife, Stacy, and our six children. I played basketball as a student athlete during my time at Rhodes College. When I'm not helping clients, I'm active with the Memphis Union Mission, volunteering my time to serve the homeless. I'm also a member of Crossroads Baptist Church in Eads where I participate in international missions. I enjoy exercise, travel, and spending time with my family.