



TIMOTHY J. STANZ, CFS, LUTCF®

**Investment Advisor Representative
Financial Advisor**

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My Business Philosophy

I provide total financial needs analysis through a network of experienced professionals with expertise in:

- Advisory services
- Retirement analysis
- Estate strategies
- Employee benefit and retention services
- Business continuation strategies
- Trust services

Professional Qualifications

- BBA, The University of Memphis (1982)
- Entered financial services industry in 1983
- Earned Certified Fund Specialist (CFS) designation
- Earned Life Underwriter Training Council Fellow(LUTCF®) designation
- Licensed Registered Representative and Investment Advisor Representative with MMLIS
- Member of NAIFA for 30+ years
- Former Board Member and Treasurer of NAIFA Memphis (1992 - 1998)

About Me

I've been a Fayette County resident since 1999 where I live with my wife, Cathy, who I've been happily married to since 1981. I'm an active member of my community, having served as President of the Fayette County Chamber of Commerce for two terms (2005 and 2013). When I'm not at the office, I enjoy spending time at church, fishing, boating, gardening, and maintaining my hobby farm.