

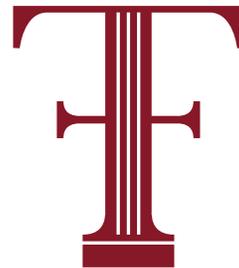
# CLIENT PATHWAYS

## Needs-based client:

- ◆ Life Insurance
- ◆ Annuities (fixed, variable, income)
- ◆ 401(k) rollovers
- ◆ Long-Term Care (nursing home) Insurance
- ◆ College Funding
- ◆ Mutual Funds
- ◆ Income Streams
- ◆ Health Insurance (group only)

**Darren Schwinefus**  
FSCP®, LUTCF®, RICP®  
Partner | Financial Advisor\*

Office: 608.356.0200  
Cell: 608.604.9210  
Fax: 608.356.0203  
dschwinefus@ft.newyorklife.com



FIRM FOUNDATION  
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433 Linn Street, Baraboo, WI 53913  
Office: 608.356.0200 | Fax: 608.356.0203

## Comprehensive planning:

- ◆ Retirement Strategies & Estimates
- ◆ Portfolio Risk & Diversification Analysis
- ◆ Estate Conservation
- ◆ Multi-Generational Strategies
- ◆ Social Security Optimization
- ◆ Small Business Exit Strategies
- ◆ Pension Maximization
- ◆ Income Solutions Analysis
- ◆ Tax Reduction Strategies

**Jonathan Mead**  
Partner | Financial Advisor\*

Office: 608.356.0200  
Cell: 608.354.4819  
Fax: 608.356.0203  
jmead@ft.newyorklife.com

Darren Schwinefus and Jonathan Mead, Registered Representatives offering securities through NYLIFE Securities LLC, Member FINRA/SIPC, a Licensed Insurance Agency.  
999 Fourier Drive | Suite 300 | Madison, WI 53717 | 608.831.4416

\*Financial adviser offering investment advisory services through Eagle Strategies LLC, a Registered Investment Adviser.  
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