

# Field Financial Strategies, LLC<sup>SM</sup>

Live Confidently.

## HOW WE HELP

“Your life, as a result of your relationship with Field Financial Strategies, will be greatly enhanced. Our goal is to provide you confidence in your financial future.”

- Joel Field, Founder

### Our Mission

To empower you to live life to the fullest and confidently pursue your goals, worry-free about your finances.

### “BOUTIQUE”

*is not about us, it's about you.*

As a boutique financial planning practice, it is our priority to serve you diligently and proactively — and with objectivity.

Our practice and our Financial Empowerment Process<sup>SM</sup> are purposefully designed to best provide individualized attention to your goals and objectives.

Through Field Financial Strategies, LLC, you have access to a wide network of the nation's top asset management and insurance firms, providing you with world-class expertise in financial planning analytics, investment alternatives, insurance options, and asset management services — something we believe all clients of a boutique practice should expect.

### Get in Touch

P 844.605.0113 | F 614.807.2306  
E [joel@fieldfinancialstrategies.com](mailto:joel@fieldfinancialstrategies.com)  
**FieldFinancialStrategies.com**

### Our Identity

At Field Financial Strategies, LLC, **relationships** are at the heart of our business.

*It's not a coincidence that our practice is built upon referrals.*

We are — and intentionally remain — a **boutique** financial planning\* practice providing **objective** comprehensive financial planning and wealth management services.

We are inspired by our desire to help people live life to its fullest, unbridled by finances. We pride ourselves on: cultivating deep, meaningful relationships with our clients, providing the finest advisory services, and delivering precision and a superior client experience.

### Our Focus

We advise highly successful professionals, business owners, and physicians around the country on the unique opportunities and challenges created by their success.

To address the multifaceted needs of our clients, we invest significant time and resources cultivating the expertise demanded by complex financial situations.

As a member of The Nautilus Group®, Joel is backed by a planning team with subject matter experts in the law, accounting, finance and additional sophisticated planning strategies. With this elite planning resource we can provide our clients with the state-of-the-art, customized planning strategies that are tailored to their unique requirements.

**New York City**  
420 Lexington Ave  
15th Floor  
New York, NY 10170

**Chicago**  
500 West Madison St  
Suite 1725  
Chicago, IL 60661

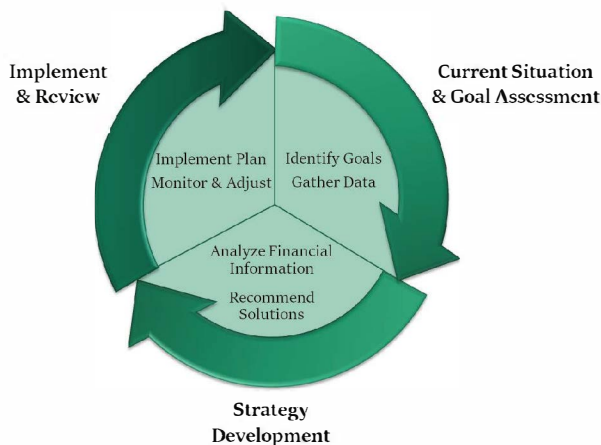
**Columbus**  
75 East Wilson Rd  
Suite C-1  
Worthington, OH 43085

# Field Financial Strategies, LLC<sup>SM</sup>

Live Confidently.

## OUR FINANCIAL EMPOWERMENT PROCESS<sup>SM</sup>

Our Financial Empowerment Process<sup>SM</sup> is a uniquely personal, comprehensive approach to financial planning that always puts your interests first.



**Current Situation and Goal Assessment:** We start by learning about you — who you are, your specific wants and needs, and what it would take for you to live life to the fullest with no financial worries.

**Strategy Development:** With a firm understanding of your financial situation and life goals, we partner with you to develop a sound strategic approach designed to accomplish your objectives. Selected from a wide array of options, our recommendations seek to add value and improve upon your current strategy.

**Implementation and Review:** If you work with us to implement your plan, we will work closely with your legal and tax professionals to put your personalized financial strategy into action. Then, in consultation with you, we review your progress and make adjustments as market conditions and objectives evolve.

Our Financial Empowerment Process<sup>SM</sup> provides you a framework to realize the future you desire and a clear view of your path forward. Then, we continue to support you with ongoing guidance to keep you on track toward a confident financial future.

## OUR SERVICES

At Field Financial Strategies, LLC, we approach comprehensive financial planning as a puzzle with many pieces. While many advisors may focus on a few pieces of the puzzle, the “bigger picture” can best be accomplished by examining how all the pieces of your financial “big picture” fit together – not just a couple. By examining all of the pieces relevant to your financial picture, our comprehensive financial planning services will help you create a complete, harmonious financial picture.



Joel M. Field, III, Sam Strum and David Tucker are Registered Representatives offering securities through NYLIFE Securities LLC, Member FINRA/SIPC. A Licensed Insurance Agency. 420 Lexington Avenue, 15th Floor, New York, NY 10170, 646.227.8000 and 500 West Madison Street, Suite 1725, Chicago, IL 60661, 312-454-2288. Financial Advisers offering investment advisory services through Eagle Strategies LLC, A Registered Investment Adviser. Field Financial Strategies, LLC is not owned or operated by NYLIFE Securities LLC or its affiliates. Joel Field, Member Agent, The Nautilus Group is a service of New York Life Insurance Company. The Nautilus Group as well as its members do not provide tax, legal or accounting advice. SMRU #5679521.2 Exp. 6/30/28