

Field Financial Strategies, LLCSM

Live Confidently.

MY MISSION

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



JOEL M. FIELD, III

CFP®, CLU®, LUTCF® | Founder & Financial Planner



Not an indication of future performance or any one client's experience. See [methodologies](#).

OUR CORE VALUES

INTEGRITY

We walk our talk.

HONESTY

We are forthright and transparent.

CONTINUAL EDUCATION

We strive to always be learning, growing and improving.

HUMANITY

We sincerely care about people and value their wellbeing.

THOROUGHNESS

We do not leave any stones unturned.

Get in Touch

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E joel@fieldfinancialstrategies.com

FieldFinancialStrategies.com

My Objective

To build with you a strong lifelong client/adviser relationship, in which we both are committed to working toward accomplishing your goals and objectives. Your interest is always upheld as the foremost concern.

My Process

Our Financial Empowerment Process is a uniquely personal, comprehensive approach to financial planning. Through a series of conversations, we learn about you, discuss your life goals, and develop a strategy tailored to your specific objectives. Then, we implement your strategy and consult with you to keep it on track.

New York City

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

Columbus

75 E Wilson Bridge Road, Suite C-1
Worthington, OH 43085



I BELIEVE...

- Success is determined by preparing for the future proactively. Hoping for the best is not a strategy.
- Openness and honesty are essential.
- We should like and trust each other.
- Your involvement is crucial to accomplishing your financial goals.
- A healthy exchange of ideas between all of your advisers is essential to achieving your desired success.
- Consciously-designed financial strategies need to be agile in order to adapt as needs change throughout your life.
- If I make a mistake, I should correct it. If you feel I have made an error, please feel comfortable enough to speak with me so that I may address it.
- A competent and valued team is critical to executing my mission to serve you as a client. I treat our team with respect and ask that you do as well.
- A referral is the highest compliment you can give. If you see value in what we have discussed or accomplished, please introduce me to those you feel may also benefit.

PERSONAL PROFILE

CERTIFIED FINANCIAL PLANNER™ professional

FINRA Series 6, 63, 66, 7 and Health Insurance licensed

University of Louisville 2004

- B.S. Business Administration
- Emphasis in Finance

Cincinnati Christian University 2007

- Master's of Divinity

The Family Center

- Chairman of the Board 2018 - 2024
- Vice Chairman of the Board 2016 - 2018
- Member of the Board 2014 - 2016

The Legacy Fund of the Columbus Foundation

- Board Member 2011 - 2015

Contributor for various media outlets

- Including various printed works and Sirius XM

"With the highest credentialing available for a financial planner, I bring to a client relationship the expertise necessary to accurately address financial objectives, while still maintaining the approachability, honesty and candor expected from a friend."

-Joel Field, Founder