NAVIGATION
FINANCIAL GROUP

John Wolverton
Director / Financial Planner

Practice Focus

- Individual & Business Financial Planning
- Estate Planning Strategies
- Retirement Plan Selection & Evaluation
- Special Needs Planning
- Investment & Insurance Analysis

Education/Certification

- Bachelors and Masters degrees from East Texas State University
- Chartered Life Underwriter (CLU®) – The American College in Bryn Mawr, PA
- Certified Fund Specialist (CFS) -Institute of Business and Finance in La Jolla, CA
- Registered Financial Consultant (RFC)

15770 N. Dallas Parkway
Suite 650
Dallas, TX 75248

(P) 214-217-5802
(E) JWolverton@NavigationFinancial.com

John Wolverton

CLU, CFS, RFC

As an independent financial planner, John has been serving clients since 1979. He works with individuals, business owners and key executives to develop strategies in the following areas:

- Individual and Business Financial Planning
- Estate Planning Strategies
- Retirement Plan Selection and Evaluation
- Special Needs Planning
- Investment and Insurance Analysis

John holds many professional industry designations including CLU (Chartered Life Underwriter), CFS (Chartered Fund Specialist) and RFC (Registered Financial Consultant). Based on assets under management, John has consistently been recognized as being in the top five percent of about 2,000 advisors with Securities America Advisors, Inc. In 2009, he was recognized as one of the Dallas/Ft. Worth Area's "Five Star Wealth Managers" by Texas Monthly Magazine*. This award is presented to the top three percent of wealth managers in the Dallas/Ft. Worth area.

John helps clients seek financial freedom and independence by helping them establish clear goals and financial discipline. He works with clients to prepare a plan that takes into consideration their goals, unique needs, time frames and risk tolerances. John helps to educate clients so they can make well informed decisions and find meaningful financial solutions to their specific, personal circumstances.

John enjoys spending time with his wife Danette, three children and two grandchildren. He is a deacon at his church, serving on various committees. John has also been a board member for four corporations during his financial career.

He also likes to spend time golfing, fishing, hunting and coaching. Having coached baseball for over 30 years, five of the young men in his program have gone on to play major league baseball. John proudly served his country for four years, riding submarines for the United States Navy.

*The FIVE STAR Wealth Manager list is created by Crescendo Business Services LLC. It includes less than 3% of wealth managers in the Dallas/Fort Worth area in 2009 and reflects those scoring highest in client satisfaction. Wealth managers where identified by surveys conducted with 95,000 consumers and 7,250 financial professionals, and evaluated across nine attributes-customer service, integrity, knowledge/expertise, communication, value for fee charged, meeting financial objectives, post-sale service, quality of recommendations, and overall satisfaction. Favorable and unfavorable evaluations are included in the score. Each wealth manager is reviewed for regulatory actions, civil judicial actions, and customer complaints. Wealth managers do not pay a fee to be included in the research or final list. Scores reflect an average of all respondents and may not be representative of any one client's evaluation. Working with a FIVE STAR Wealth Manager does not guarantee investment success.

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