



Steven P. Hagemann, CLU
Financial Planner

Practice Focus

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

Education/Certification

- Bachelor of Business Administration from Stephen F. Austin University
- Chartered Life Underwriter (CLU®) – The American College in Bryn Mawr, PA

**15770 N. Dallas Parkway
Suite 650
Dallas, TX 75248**

**(P) 214-217-5808
(E) SHagemann@NavigationFinancial.com**



Steven P. Hagemann
CLU, Financial Planner

Steve has worked in the financial services area for over 34 years. He assists individuals, business owners and executives with developing financial strategies in the following areas:

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

Steve helps his clients seek financial freedom and independence by establishing clear goals and financial discipline. Using a long-term relationship approach, he works with clients to prepare a plan that takes into consideration their needs, goals, risk tolerance and investment time frames. Focused on a custom, personalized service experience for clients, Steve engages in collaborative planning with other key financial professionals such as attorneys and CPAs to help ensure each client’s specific needs are addressed.

Steve is currently President and Director of Navigation Financial Group. He obtained his Bachelor of Business Administration Degree from Stephen F. Austin University in 1974, and is a prior board member of the Dallas Association of Life Underwriters. Committed to ongoing education and learning in order to better serve clients, Steve has attained a Chartered Life Underwriter (CLU®) industry designation from The American College in Bryn Mawr, PA.

In 2009 and 2010, Steve 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.

Steve resides in Dallas and is a member of the Water Mark Church. When not busy helping clients, he enjoys golfing, fishing and outdoor lake activities.

*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 were 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.

Securities offered through Securities America, Inc. Member FINRA/SIPC. Steven P. Hagemann, Registered Representative. Advisory services offered through Securities America Advisors, Inc., Steven P. Hagemann, Investment Advisor Representative. Navigation Financial Group and the Securities America companies are unaffiliated.