



Roger Gekiere
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 degrees from Stephen F. Austin
- Certified Fund Specialist (CFS) -Institute of Business and Finance in La Jolla, CA
- Certified Financial Planner (CFP®)

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Roger Gekiere

CFP®, CFS,

As an independent financial planner, Roger has been serving clients since 1988. 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
- College Planning

Roger holds many professional industry designations including CFS (Chartered Fund Specialist), CFP (Certified Financial Planner), fixed and variable insurance and maintains his series 6,7,63, and 65 industry licenses. Roger is currently serving on the board of Franklin County Appraisal District.

Based on assets under management, Roger has consistently been recognized as being in the top five percent of about 2,000 advisors with Securities America Advisors, Inc. In 2009 and 2010, 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.

Roger 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. Roger helps to educate clients so they can make well informed decisions and find meaningful financial solutions to their specific, personal circumstances.

Roger resides at Lake Cypress Springs in Mt. Vernon, Texas with his wife Betsy, and their two children, Robert and Kathleen. Roger and his wife are active members of the First United Methodist Church in Mt. Vernon. He also likes to spend his free time golfing, fishing, hunting and cycling.

*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 2010 and reflects those scoring highest in client satisfaction. Wealth managers were identified by surveys conducted with over 160,000 high-net-worth households** and 6,000 financial professionals and evaluated across nine attributes - customer service, integrity, knowledge/expertise, communication, value for fee charged, meeting of 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. **Defined as the upper 1/3 of all households based on net-worth. -
Securities offered through Securities America, Inc. Member FINRA/SIPC. Roger Gekiere, Registered Principal. Advisory services offered through Securities America Advisors, Inc., Roger Gekiere, Investment Advisor Representative. Navigation Financial Group and the Securities America companies are unaffiliated.