LIFETIME STRATEGIES GROUP

Member of John Hancock Financial Network

Occidental Tower
5005 LBJ Freeway, Suite 1300
Dallas, TX 75244
Phone: 972-774-0700
Fax: 972-726-8802

OFFICE LOCATIONS
Dallas, Austin, and Fort Worth, TX

www.lifetimestrategiesgroup.com

Joseph E. Mahoney, CLU, ChFC
President

DIRECTOR OF OPERATIONS
Veronica M. Bell

ADVANCED PLANNING
Samuel R. Lee, JD, CLU, ChFC, AEP

LONG-TERM CARE INSURANCE
Dan B. Wilensky, CLU, LUTCF

INVESTMENTS
Michael J. Smith, CLU, ChFC

MANAGER OF MARKETING SERVICES
Maureen Mahoney

DIRECTOR OF COMPLIANCE
David C. Fussell, CFP®, LUTCF

Lifetime Strategies Group is dedicated to helping people pursue lives of extraordinary value. Motivation, a sense of purpose, and achievement drive the firm and its associates to high levels of success in building, growing, and investing in their practices. The firm offers three options for affiliation based on level of independence and support desired. Resources and practice management support are customized for financial representatives based on their affiliation and business vision. Lifetime Strategies Group believes that the integration of personal and professional development brings out the best in people, and as a result, the firm delivers a flexible, supportive environment that challenges and inspires financial representatives.

Resources

- Open product platform with a comprehensive range of high quality protection, investment, and advisory products from leading carriers including John Hancock.
- Access to a top-tier broker dealer, Signator Investors, Inc., providing a robust operational platform to facilitate your business.
- Firm specialists in investments, long-term care insurance, and estate planning.
- A sophisticated estate and business planning group provided by the John Hancock Advanced Markets Group, consisting of experienced attorneys, accountants, actuaries, and case design specialists. This service is available to financial representatives working with current and prospective clients.
- Build4Success, an equity and succession platform providing support for the purchase or sale of your business. This platform includes valuation models, financing support, tax allocation strategies, and transition planning.

Practice Management

- A consultative approach to practice management includes a step-by-step process for financial representatives on how to launch their businesses, market themselves, and invest in their personal and professional growth.
- One-on-one assistance in developing customized marketing plans and access to the firm's calendar of local events and networking opportunities for business development.
- A lead and outreach program that aligns current clients with active financial representatives.
- A comprehensive training and practice development process as well as a proprietary program on how to access affluent markets.
- Third party target market training resources and promotion of lifelong learning through the pursuit of advanced designations.
- Provides and encourages mentoring and joint work opportunities.

Recognition

GAMA Gold Agency

35 FINANCIAL REPRESENTATIVES