My credentials are as follows:

- 45+ years in the financial services business 1963-present.
- Charter Life Underwriter, 1985-present with a specialization in Retirement Planning.
- Adjunct Professor, College for Financial Planning, 1984-1985.
- Instructor for Credentialing with the Davidson School, University of Southern California, 1984-85.
- California Community College Lifetime Instructors Credential in Insurance issued 1983-present.
- National Association of Security Dealers registration for Series 7, General Securities, Series 63. Voluntarily resigned my position as Branch Manager in January 2003 to concentrate on insurance.
- Licensed in Idaho as Resident Agent, License and company is licensed in Idaho as Resident Agent, License . Licensed as Non-Resident Agent in California, License #0301088 Currently, Successful completion of California required 8 hours of Continuing Education credits per year to transact annuity business in that state. Current Non-Resident Agent in Nevada, License .
- Associated with Cravens & Associates to provide retirement planning services to the Idaho Association of School Administrators and Educators. Through this affiliation, I have access to sophisticated tools for the analysis of retirement assets to maximize return and minimize risk.
- Member, Society of Financial Services Professionals (SFSP), 1983-present Member, Treasure Valley Chapter, (SFSP), Boise, Member, Board of Directors-1987-88, National Association of Health Underwriters (NAHU), 1982-present. Founding Member, Los Angeles Association of Health Underwriters, 1982-2003.
- Member, National Association of Health Underwriters, 1983-present. Member Treasure Valley Association of Health Underwriters, Boise, ID, 2003-present.
- Founding Member, McCall Advisory Group. Comprised of Financial Service Professionals offering financial advice to members of the community, 2005-present. This group of advisors is comprised of an estate planning attorney, an accountant, a financial management firm, a mortgage broker, a real estate agent, a Property & Casualty Insurance agent and my agency.

Please give me a call to arrange a mutually convenient time and place for us to meet. A meeting will enable me to gather the necessary information to make firm recommendations. I look forward to the possibility of working with you in assessing your specific needs and helping make educated decisions in how you allocate your dollars which you have allocated for financial planning, retirement needs and health insurance.

I can be reached ***Toll-Free at 800 964-3326.*** My address and contact information is as follows:

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