



Greetings,

Understanding that you need solid, timely, objective information about the Central Pennsylvania business climate and economy – I would like to offer myself as a local resource to you. I realize you work under immense deadline pressure to report and analyze business news that's relevant to your readers – I would be happy to help you fulfill that journalistic mission – giving you updated statistics, information, and insight to help local consumers, business owners and investors; and I will be available when you call.

I am the senior managing partner of uFinancial Group, previously known as Wienken & Associates, and for over 35 years, we've been offering financial advice, tips, and planning to people in the Central PA region. uFinancial Group currently services over \$5.6 billion in assets and works with over 52,000 individuals and businesses. With a team of over 100 financial professionals, uFinancial Group serves a significant portion of Central PA residents.

The firm is a three-time winner of the General Agents and Managers Association (GAMA International) Master Agency Award as well as multiple product leader and individual achiever awards from Massachusetts Mutual Life Insurance Company.

Our Web site, www.uFinancialGroup.com, is an at-home, anytime resource for answering a range of possible financial questions. We've got a full library of articles, tools, calculators, podcasts, videos and more for learning about specific topics, and we host regular community events to educate people from all walks of life on financial responsibility.

Members of my team speak publicly about a range of important and timely issues including:

- Retirement planning
- Investment strategies
- Insurance planning
- Education funding
- Comprehensive financial planning

I can also provide hypothetical examples and interviews to help illustrate your stories with an angle of human interest.

I would be happy to discuss how I can be an ongoing resource to you and your staff.

Sincerely,

Matthew Dobbie
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Matthew J. Dobbie is a registered principal of and offers securities, investment advisory and financial planning services through MML Investors Services, LLC, [Member SIPC](#). 5001 Louise Drive, Suite 300, Mechanicsburg, PA, 17055. 717-791-3300.

PROFILE



Matt Dobbie
President & CEO

Matt Dobbie is the President and CEO of Financial Group, a financial planning firm that has been serving the Mid-Atlantic since 1890. Financial Group has offices in State College, Camp Hill, Exton, Williamsport, Hanover, and Lancaster, Pennsylvania and Delaware and has over 100 financial professionals and an additional 100 staff people. Financial Group works with over 52,000 individuals and businesses, and services in excess of \$5.6 billion in assets.

Matt has accumulated many accolades over the course of 20 years in the financial planning industry. During his first two years, he qualified for New England Financial's (NEF) Leaders Conference, won the Star Producer and Disability Income awards, and was named Advisor of the Year - 1998. In 2001, Matt was promoted to Managing Associate and was awarded the Managing Associate of the Year in 2000. Matt has also received subsequent additional awards for Top Recruiters Forum 1997-2000, Agency Builders Conference 1997-2000, the Managing Associate Advisory Committee 1999-2000 and NEF's highest award, the Chairman's Council 2000.

In January, 2006, Matt joined Massachusetts Mutual Life Insurance Company (MassMutual) as Senior Managing Partner of the Central Pennsylvania Agency. Since then, the agency was awarded the Crystal Achievement Award in 2009; Double Three is Key Award in 2008 and 2009; Net Field Force 100+ Award in 2009 through 2012; Premium Leader in 2009; Annuities Leader in 2008 and 2009 and Investment Leader each year 2008 through 2013 (the agency has held this award for 22 consecutive years); GAMA's Master Agency Award each year since 2008 and GAMA International's International Management Award – Diamond Level each year since 2008.

A graduate of Washington and Jefferson College, Matt received dual bachelor degrees in Finance and English. He is a member at his local church. Matt is a native of Camp Hill, PA and now resides in Mechanicsburg, PA with his wife, Sherry and two sons, Grant and Dane.

Speaking History

- 5 time speaker at NEF's National Top Recruiters Forum
- 4 time speaker at NEF's National Agency Builders Conference
- 4 time speaker at NEF's National General Agents Conference
- Guest speaker at multiple NEF home office schools and offices around the country
- **Nationally published** in the *GAMA International Journal* on the power of study groups

Areas of specialty

- Retirement planning
- Investment strategies – fundamentals of investing, investment products, etc.
- Insurance planning – life, disability income, and long term care insurance
- Education funding
- Comprehensive financial planning
- Secrets of success for building a financial services firm

Memberships

National Association of Insurance and Financial Advisors (NAIFA)

Young President's Organization www.YPO.org

General Agents and Managers Association (GAMA International)

Matt can be reached at 717-791-3391 or mdobbie@financialguide.com

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Core Values

The following core values reflect what is truly important to uFinancial Group as an organization. These are not values that change from time to time, they are the foundation of our company philosophy. These values guide our daily work and long-term goals, driving enduring relationships with clients, each other and the greater community. These core values are at the soul of our business.

Integrity - Acting strictly on behalf of our clients' best interests, offering some of the best products available, and never compromising confidentiality

Education - Sharing and teaching about financial responsibility with clients and the greater community

Compassion - Caring about and supporting our clients and communities in both prosperous and difficult times

Mission Statement

At uFinancial Group, we act with integrity and compassion and use our resources and extensive knowledge to build relationships that work toward positive growth and financial security for our clients and their loved ones. We are educators of our communities, helping people discover and achieve their personal and financial dreams.

Positioning Statement

uFinancial Group provides insight on insurance and financial products and services with a one-on-one, educational approach to help you discover and achieve your personal and financial dreams for the future.

Securities, investment advisory and financial planning services offered through qualified registered representatives of MML Investors Services, LLC, [Member SIPC](#). 5001 Louise Drive, Suite 300, Mechanicsburg, PA, 17055. 717-791-3300.