



## Tom Lindsay

Registered Representative

Tom Lindsay began his practice at Savage and Associates in 2004 and has built a practice with a broad and loyal client base. He specializes in personal investment and retirement strategies, as well as life insurance planning for families and individuals. He works with his clients to design strategies that will help each client build, grow, and protect their wealth.

### What You Can Expect

Tom first learns about your goals, objectives, and what's important to you in the big picture. He then uses this information to create a portfolio to help get you to where you want to be. Through proper asset allocation, diversification and rebalancing, he will work to help you enhance and protect your wealth. Finally, you can expect to have annual or semi-annual meetings, based on your preference, to review progress and make adjustments based on the current markets and economic environment at hand.

### Education

Tom attended Toledo St. John's Jesuit and Bowling Green State University where he graduated with a degree from the college of Business Administration. He has also achieved his Life Underwriter Training Counsel Fellow designation in 2008. He is life and health licensed, along with Series 6 and 63 securities registrations in the states of AZ, CA, FL, GA, IN, MI, NC, OH and WI.

### Personal

Tom resides in Toledo, OH where he enjoys spending time with his friends and family, traveling, and going to the lake on the weekends. He also enjoys coaching CYO basketball, is on the Alumni Advisory board at St. John's Jesuit High School, and is a member of Leadership Toledo, a non-profit organization that promotes leadership and involvement in the Greater Toledo area.

### Registrations:

Securities Registered in AZ, CA, FL, GA, IN, MI, NC, OH, WI

Registration Series 6 and 63

### Designation:

(LUTCF) Life Underwriter Training Counsel Fellow

### Contact:

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