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Goheen Financial Group is a separate entity from any other member of AIG

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Dare to dream...

Keep your promises...

Today

Tomorrow

Generations to Come

Make a wish...

How will you be remembered?

Welcome to Goheen Financial Group



GOHEEN FINANCIAL GROUP HELPS YOU REALIZE YOUR DREAMS FOR YOUR BUSINESS AND YOUR FAMILY — TODAY, TOMORROW AND IN GENERATIONS TO COME.

THROUGH AN EVER EXPANDING NET WORK OF FINANCIAL RESOURCES, WE PROVIDE ACCESS TO A BROAD RANGE OF PRODUCTS DESIGNED TO PROTECT AND GROW YOUR FINANCIAL ASSETS. IN ADDITION, GOHEEN FINANCIAL GROUP'S WEALTH-WISE™ APPROACH INTEGRATES ALL OF YOUR FINANCIAL CONCERNS UNDER ONE UMBRELLA.

WHETHER YOU ARE EXPANDING YOUR BUSINESS, PLANNING FOR RETIREMENT OR PASSING ON ASSETS TO YOUR HEIRS, OUR FOCUS REMAINS ON YOU, OUR CLIENT. ONCE WE KNOW WHERE YOU ARE TODAY AND WHERE YOU NEED TO GO, WE MAKE APPROPRIATE RECOMMENDATIONS DESIGNED FOR YOU ALONE. IT'S A PANORAMIC VIEW THAT PUTS YOUR ENTIRE FINANCIAL LIFE INTO PERSPECTIVE.



Goheen Wealth-Wise™

One man's vision...

“My goal was to break the mold in terms of wealth preservation. Many of my initial clients were entrepreneurs and business owners like myself. I quickly found that these individuals had unique needs the larger financial institutions were not addressing. In particular, my clients required a smart, common-sense approach that addressed all of their financial concerns — business and personal. Not a cookie-cutter product, but a program designed for every individual. So that’s what I set out to accomplish, and it’s this seamless integration of services that continues to set us apart.”

— Shawn E. Goheen



GOHEEN FINANCIAL GROUP WAS FORMED IN 1990 BY SHAWN E. GOHEEN, WHO WAS RAISED IN FT. WORTH AND STUDIED BUSINESS AT TEXAS STATE UNIVERSITY. GOHEEN SPENT NEARLY A DECADE IN THE FINANCIAL SERVICES INDUSTRY

BEFORE OPENING HIS OWN FIRM IN SUGAR LAND, TEXAS — A GROWING HOUSTON SUBURB IN THE HEART OF FORT BEND COUNTY.

EARLY ON, GOHEEN IDENTIFIED FORT BEND AS A PROMISING CENTER FOR ECONOMIC GROWTH. HIS INSTINCTS PROVED RIGHT AS FORTUNE 500 COMPANIES, CORPORATE OFFICES AND INDEPENDENT BUSINESSES PUT DOWN ROOTS.

AS THE REGION GREW, SO DID GOHEEN FINANCIAL GROUP — A REFLECTION OF THE AREA’S STRONG ECONOMIC CLIMATE, BUT ALSO A CLEAR RESULT OF SHAWN GOHEEN’S DEDICATED APPROACH. IN 2005, THE COMPANY DEBUTED A NEW HEADQUARTERS DESIGNED TO ACCOMMODATE A GROWING CLIENTELE AND STAFF, WITH AMPLE SPACE FOR FUTURE EXPANSION.

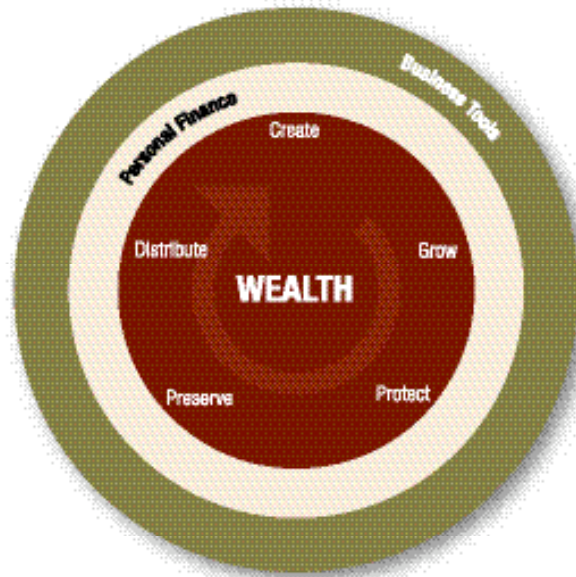
LIKE SO MANY OF HIS CLIENTS, SHAWN GOHEEN LOVES WHAT HE DOES AND REMAINS PASSIONATE ABOUT HIS WORK, HIS FAMILY AND HIS COMMUNITY.



Goheen Wealth-Wise™

“Think wisely, as the decisions you make today will reverberate long into the future. Act now, for it is never too late to prepare for tomorrow.”

—Shawn E. Goheen



Goheen Wealth-Wise™

Goheen Financial Group provides smart, intelligent solutions for its clients. It's called Wealth-Wise, a robust tool that puts your entire financial life in order, start to finish.

It begins with a series of questions that are formulated into a lifestyle matrix. The process expands to pinpoint areas of need, guiding you through every stage of development, strategy and implementation. We focus on one segment of your financial life or an entire landscape. It's a big-picture approach custom designed for every individual.

Wealth-Wise offers a number of advantages over a traditional approach:

Dual-Core Design: An underlying structure designed to integrate business and personal goals.

Attention to Detail: The confidence of knowing that every account is handled with professionalism, objectivity and expertise.

Long-term Outlook: A statistical evaluation of your financial life, one that anticipates the changing needs of your business, your family and your heirs.

Security: Ongoing protections, firewalls and system-wide backups, with the ability to respond and communicate quickly.

Communications: Quarterly performance reports, statistical projections and leading-edge research, plus two-way direct communications with your representative.

Dare to dream...

In business, as in life, one should always look ahead. Like many achievers, our clients face numerous challenges on their path to success. Once there, these leaders, drivers and influencers will leave a permanent mark on our community — through their businesses, their philanthropy and their social contributions. And with so many accomplishments, it's not surprising that many overlook the details of their own financial lives. That's where Goheen Financial Group steps in.



We help clients accurately assess where they are today and how they will manage their business assets in the years ahead. Goheen Financial Group provides guidance, strategies and resources to maximize and protect assets, install benefit programs or advise on new opportunities. And when it's time to transfer leadership to the next in line, we help clients develop a seamless succession plan without compromising the company or the bottom line.

*“Dreams are the touchstones
of our character.”*

—Henry David Thoreau

Business Planning Tools:

Benefit Options

We provide the knowledge and expertise to help you select affordable benefit options that attract and retain quality employees.

- ⊗ Life Insurance (variable, whole, universal, term)
- ⊗ Short- and Long-term Disability Insurance
- ⊗ Health Care Insurance, Dental Insurance and Vision Care
- ⊗ 401(k) Plans
- ⊗ Pensions Plans

Succession Planning

When preparing for the transfer of business control, Goheen will plan and install important safeguards and underlying structures that benefit you and your company.

Tax Reduction Strategies*

Specialized tax advisors will map out strategies to protect company assets and minimize tax obligations.

Compensation Planning

To attract, retain and reward quality employees, we develop effective strategies for negotiating contracts and severance packages, salaries and benefit plans.

Corporate Trust Services

We provide objective, third-party expertise in long-term corporate fiduciary administration, including escrow, structured finance, corporate finance, document custody, and default services through affiliate advisors.

Liquidity Management

To keep cash flow in check, we install cost-effective, systematic controls that help you track spending, pay bills and fulfill ongoing investment objectives.

Make a wish...



You want only the very best for your family, but it takes more than a generous heart to plan wisely. That's why many turn to Goheen Financial Group.

We take the time to guide you through the maze of financial options, evaluating tax positions, retirement funding, insurance products and the endless array of investment opportunities. In addition, we provide an in-depth analysis that looks at your current financial condition and how it affects every part of your future financial life.

Personal Finance:

Investments

We provide access to a variety of investment products, including non-proprietary load and no-load mutual funds, fixed and variable annuities, and unit investment trusts.

Retirement Planning

We conduct a detailed inventory of your income, expenses and desired lifestyle, projecting those numbers over time and mapping out a realistic, long-term plan.

Tax Reduction Strategies

Working with tax advisory experts, you will gain insight and guidance as we develop strategies to minimize taxes at every stage of life.

Estate Planning

We can provide added protection to minimize estate taxes when distributing wealth to future generations.

Trust Services

Designed to administer and transfer assets, trusts offer a high level of accountability in overseeing your estate. When needed, we work with tax and legal professionals to ensure efficient operations and controls, so your assets are distributed exactly as instructed.

Risk Management

Insurance and annuity products deliver an added level of security for your family while also offering tax-advantaged asset accumulation. When managed wisely, these products can provide income, minimize taxes and ensure a secure transfer of wealth.

College Planning

We help families plan for a child's education using a variety of tax-advantaged solutions, including the Coverdell Education Savings Account, a Section 529 plan or one of several life insurance options.

Charitable Gifts

We can advise you on the timing and structure of gifts to maximize tax credits.

Wills

Tax and legal experts will review existing wills and advise on tax matters, directives and bequests.

"Some people want it to happen, some wish it would happen, others make it happen."

— Michael Jordan



Keep your promises...

You have worked countless hours to get where you are today. Along the way, you've built a career, raised a family and accumulated significant wealth.

When striving for success, you must make sure that all aspects of your life are in order, including your financial life and the lives of your loved ones. To provide this level of financial continuity, Goheen Financial Group delivers an uncompromising commitment to service.

Our goal is clear. We help high-net-worth individuals develop strategies to maximize wealth and shift risk to their advantage. It means making smart decisions and acting on them now.

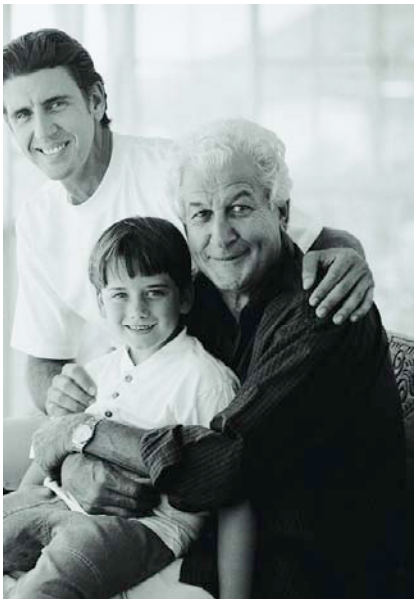
In addition to a quarterly reporting package with performance summaries and statements, we can provide a detailed look at your financial position at any point in time. We're always a phone call away and available for one-on-one meetings to discuss your concerns.

You've made a promise to protect and safeguard those you hold dear, and Goheen Financial Group will move mountains to make sure that happens.

*"The woods are lovely, dark
and deep. But I have promises
to keep, And miles to go
before I sleep, And miles to
go before I sleep."*

—Robert Frost

How will you be remembered?



As you look beyond tomorrow, think about all who depend on you for strength, direction and financial support. Think about how you will preserve your assets, your business and your reputation. Also consider who you can trust to protect and safeguard all that you value.

When a legacy is passed from one generation to another, you must rely on others for guidance and advice. Goheen Financial Group takes great pride in having managed the process for so many of our neighbors and friends. More than an heirloom or an inheritance, your legacy speaks of pride, values and traditions — lasting reminders of what you have worked so hard to build.

Our vision for tomorrow means making a real and measurable difference today.

To set up an introductory meeting, call 281.491.2821

