

PROFILE



Matt Dobbie
Managing Partner, uFinancial

Matt Dobbie is the Senior Managing Partner of uFinancial, a financial planning firm that has been serving the Mid-Atlantic since 1890. uFinancial has offices in State College, Camp Hill, Exton, Williamsport, Hanover, and Lancaster, Pennsylvania and has over 100 financial professionals and an additional 100 staff people. uFinancial works with over 33,000 individuals and businesses, and services in excess of \$3.2 billion in assets.

Matt has accumulated many accolades over the course of 15 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, Agency Builders Conference, the Managing Associate Advisory Committee and NEF's highest award, the Chairman's Council.

A graduate of Washington and Jefferson College, Matt received dual bachelor degrees in Finance and English. He is a member at his local church and has been recently nominated to the board of the Second Mile, a non-profit organization dedicated to helping young people achieve their potential as individuals and community members. 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 expertise

- Retirement planning
- Investment strategies – fundamentals of investing, investment products, etc.
- Insurance planning – life, disability, 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)

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