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, 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 currently services over $3 billion in assets, and works with over 33,000. With a team of over 100 financial professionals, uFinancial 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
Managing Partner, uFinancial
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Cell: 717_580_2783
mdobbie@financialguide.com
www.uFinancialGroup.com

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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)

Matt can be reached at 717-760-5391 or mdobbie@financialguide.com

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Core Values

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

Integrity - Acting strictly on behalf of clients' best interests, offering 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 contributing to those in need and supporting them in both prosperous and impoverished times

Mission Statement

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

Brand Promise

uFinancial will always strive to offer its associates and clients the resources and expertise to help them achieve their personal and financial dreams, helping them to secure the monetary future of themselves and their loved ones. In doing so, the company will provide the utmost selection of quality products and services; personalized, meticulous and timely service; relevant and reliable recommendations and advice; on-going and extensive, but understandable financial education for team members, clients and the greater community; all with a vision for encouraging knowledge, responsibility, and prosperity for all.