



**5001 Louise Drive
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My passion is to help families and businesses achieve their financial goals in a way that aligns with their personal value system. I strive to offer top notch service in an effort to develop long lasting, meaningful client relationships.

After taking the necessary time to meet and understand my clients' dreams, goals and dynamics, I, along with an amazing support team at uFinancial Group, will do a comprehensive financial analysis and present appropriate solutions to achieve these goals in a pressure free environment.

As needs and goals change with life, I encourage regular communication with my clients to ensure that their financial plan is always current with their life situation.

Mission Statement

At uFinancial Group, 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. We are educators of our communities, helping people discover and achieve their personal and financial dreams.

www.ufinancialgroup.com



David E. Nau, CFP®
Financial Advisor

PROFESSIONAL SPECIALTIES:

- Investment Strategy and Analysis
- Budgeting and Cash Flow Management
- Customized Retirement & Education Planning
- Income and Family Protection Planning
- Estate Planning & Analysis (in conjunction with your tax/legal advisor)

QUALIFICATIONS:

- Financial services since 2004
- BA, University of Washington
- CERTIFIED FINANCIAL PLANNER™
- Registered Representative - MML Investors Services, LLC
- Investment Advisory Representative MML Investors Services, LLC
- Series 7, 66, 9, 10, Life & Health Insurance Licensed

PERSONAL:

- Reside in Carlisle, PA with wife Vino
- Former Army Officer in PA National Guard
- Hobbies include: Drums, Woodworking, Skiing
- Serve on the Carlisle Chamber of Commerce Membership Committee

David E. Nau is a registered representative 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)790-3300

[Check the background of this investment professional on FINRA's BrokerCheck](#)