

# SCOTT R. KIMBLE

Team Leader, Wealth Management

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## ABOUT ME

My name is Scott Kimble and I work with individuals to help create income in retirement that will last a lifetime. For the past 20 + years, I have enjoyed helping my clients achieve financial wellness, retire with dignity and peace of mind.

## LIFE PHILOSOPHY

*SOMETIMES LATER BECOMES NEVER. DO IT NOW.*

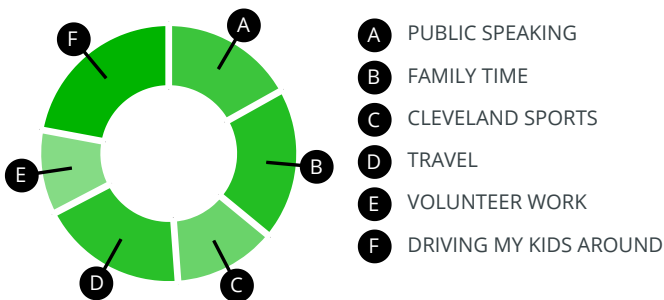
## PROFESSIONAL STRENGTHS

- Public Speaking
- Client Engagement
- Asset Allocation
- Risk Management
- Investment Guidance

## PERSONAL STRENGTHS

- Honesty
- Hard Work
- Focus
- Determination

## WEEK IN THE LIFE



## EXPERIENCE

Team Leader, Wealth Management  
**Oswald Financial, Inc.**

2017 - Ongoing

I help to devise education plans for our 401k clients and individual retirement planning for my retail investment clients.

Senior Benefit and Planning  
Counselor

**Principal Financial Group**

2007 - 2017

Managed Ohio territory Retire Secure Team. My main responsibility was to conduct individual retirement planning meetings and offer additional investment products to individual clients and maintain a book of business.

## EDUCATION

Bachelor of Arts Degree in Finance  
**Bowling Green State University**

1999

## PROUD OF

**MY CHILDREN**

My wife and I have four children and they always keep us busy, laughing and on our toes.

**MY CAREER**

I am honored to look back over the past 20 + years at all of the great people that I have met along the way and to all of my individual investment clients.