

*The Burnett Jacobson Financial Group
of City Securities Corporation™*



CREATING A LANDSCAPE FOR INVESTMENT SUCCESS





BURNETT JACOBSON FINANCIAL GROUP OF CITY SECURITIES CORPORATION™

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The BURNETT JACOBSON FINANCIAL GROUP™ of City Securities Corporation is comprised of a team with over 25 years of combined experience in the financial services industry. With current assets under management exceeding \$250 million, we provide high quality and comprehensive solutions to help achieve our client's financial goals and objectives. We organize our client's assets and then provide a strategy to help simplify, consolidate and integrate every aspect of their financial future.

Matthew R. Burnett Vice President, Financial Advisor

Matt Burnett has been working with individuals, foundations and retirement plans as a financial advisor since 1997. He develops and implements comprehensive financial plans and investment strategies for high net worth individuals and serves as a financial advisor to a number of company retirement plans. Matt received a B.A. from Indiana University in 1997 and holds his FINRA Series 6, 7, 63 and 65 securities licenses, as well as his Indiana life and health insurance licenses. Matt is currently a board member of the Indianapolis Rotary Club, Jewish Federation of Greater Indianapolis and the Riley Society for the Riley Hospital for Children. He resides in Carmel with his wife, Jill, and their three young children.

Lesley Haas, CFP® Registered Financial Associate

Lesley Haas is a CERTIFIED FINANCIAL PLANNER™ professional and a registered financial associate. She has been in the financial services industry since 1998, with a strong knowledge of individual retirement and estate planning needs for clients. In addition to her CFP® certification, Lesley holds the FINRA Series 7 and 66 securities licenses as well as the Indiana life, health and long term care insurance licenses. Lesley completed advanced training financial planning while earning the CFP® certification. She resides in Fishers with her husband Richard.

Brian Jacobson Financial Advisor

Brian Jacobson specializes in investment management, college education planning and retirement strategies for high net worth individuals. Brian also serves as a financial advisor to small business retirement plans. He focuses on developing wealth accumulation and risk management strategies for individuals, families and businesses. Brian graduated from Indiana University and received a B.S. from the Kelly School of Business in 1994. He also holds the FINRA Series 7 and 66 securities licenses, as well as his Indiana life and health insurance licenses. Brian resides in Carmel with his wife Clair, and their three young daughters.

About City Securities Corporation

Established in 1924, City Securities Corporation is Indiana's oldest and largest, independent, full service investment firm, active in retirement planning, estate planning, corporate finance, public finance, investment services, money management, wealth management and insurance. City Securities Corporation has earned the reputation as Indiana's pre-eminent municipal bond underwriter by managing or co-managing over 60% of the state's municipal bond business.

INVESTMENT PLANNING PROCESS

Our team provides a full spectrum of investment strategies, products and solutions. Our process consists of three phases.



PHASE 1: FORMING A PARTNERSHIP

The primary goal in this phase is to determine if we are the right fit for each other. We will discuss investment goals and objectives, gather data, review risk assessment and determine if we can add value to your current financial situation. We will discuss the different investment options and strategies we use for our clients, along with our fee structure.

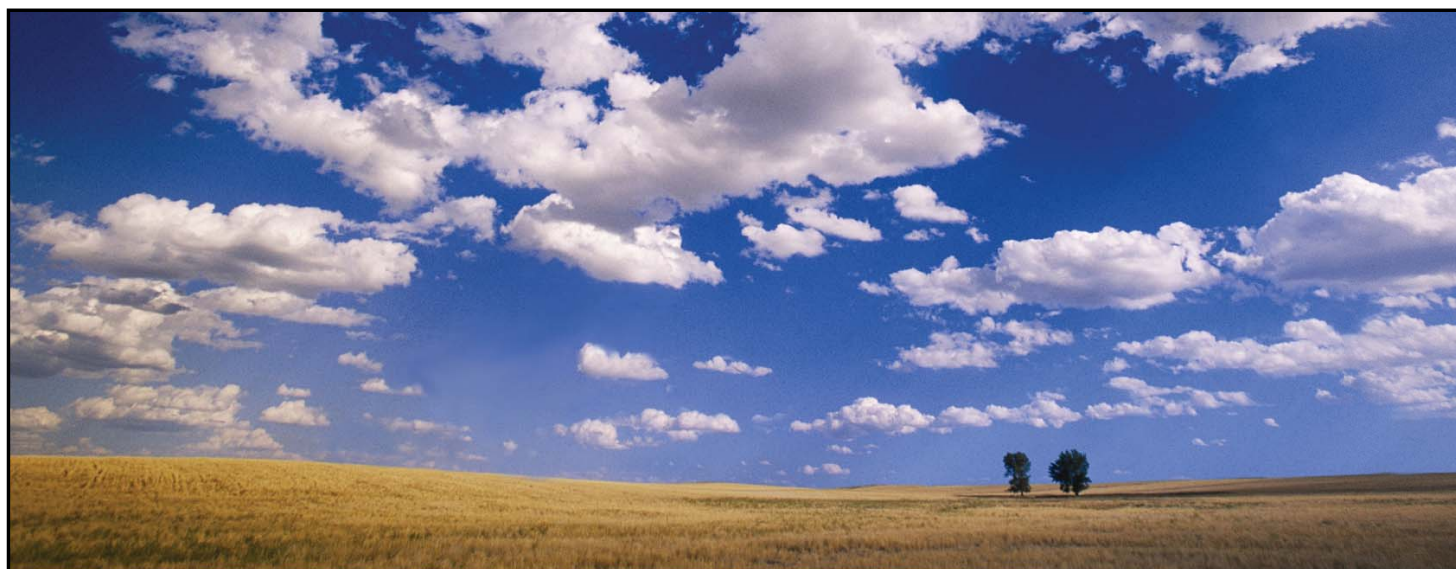
PHASE 2: STRATEGY & IMPLEMENTATION

This phase is based on a thorough evaluation of your unique financial planning needs. This allows us to identify the most effective way to create the right investment plan designed specifically for you. We create your financial road map using the following steps:

1. Identify investment goals
2. Develop a proper asset allocation strategy
3. Implement the investment plan

PHASE 3: MONITORING & COMMUNICATION

An ongoing process is put in to place to ensure that every action taken in your account is consistent with your goals and objectives. We monitor and manage each account to ensure they are performing to our expectations and yours. We offer consistent communication with you through annual reviews, weekly and monthly electronic market updates, and being accessible to service your needs.



DECADES OF GROWTH ON THE HORIZON

CITY SECURITIES CORPORATE TENETS

TRUST

Paramount in what we do externally and internally

RESPECT

For ALL clients and ALL fellow employees under ALL circumstances

INTEGRITY

In everything we do...builds trust and creates bonds that are difficult to break

ATTITUDE

Positive mindset is essential for maximum productivity and an effective working environment

COMMITMENT

To the mission of City Securities Corporation in order to ensure our future independence

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