



David Gray

Personal Marketing Assistant

- Insurance Agent
- Application specialist
- Office Management
- Published Author
- BS History / Min Pol Sci and international relations



Dee Johnson

Personal Marketing Assistant
Administration and Operations
Management

- Beneficiary Specialist
- New Business Coordinator
- Double MA - Special Education / Elem Ed / Teacher



Rhonda Thompson

Personal Marketing Assistant

- Workshop Specialist
- New business Coordinator
- Double MA Education



WestPointfinancial

G R O U P



Gordon F. Homes Jr., CFP

Senior Financial Planner
Special Care Planner

INDIANAPOLIS, IN
900 E. 96th Street, Suite 300
Indianapolis, IN 46240

LOUISVILLE, KY
9960 Corporate Campus Drive, Suite 1100
Louisville, KY 40223

Telephone: 317-567-2005
Toll Free: 800 903-6380
Facsimile: 317-469-2500
Cell Phone: 317-506-4734

Email: ghomes@financialguide.com
Website: www.gordonfhomes.com

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Senior Financial Planner
Special Care Planner



Every financial plan is important, some are special

Personal and
Business Insurance

Financial
Planning Services

Special Needs

to help people

My approach to the financial planning process

A passion to help people is the foundation of my financial planning practice. With over 30 years of experience .

I help people plan for the future and attain financial freedom for themselves and their loved ones. I am blessed to participate in such a breadth of human experience.

Working closely with clients, we set realistic personal and financial goals and develop a comprehensive financial plan that guides clients to achieve their education, retirement, investment and estate planning objectives. Many existing clients look to me for assistance with their business and personal insurance and investment needs, including life, disability, long-term care, annuities and mutual funds.

My passion to serve is born out of my personal journey as a parent of a child with special needs. As a Special Needs Financial Planner . I help families who have children or other dependents with special needs address the serious questions concerning their future well-being. Through an in-depth knowledge of special needs trusts, insurance, guardianship, rules relating to government benefits eligibility, organizations serving the special needs community, and strategic alliances with Special Needs Attorneys, I work together with parents or caregivers to help ensure lifetime care and quality of life.

Through my years in management, I have developed a profound interest in financial education.



Gordon resides in Hamilton County with his wife Alice pictured with their children: Liz, Emily, and Matthew.

My goal is to help clients achieve lifelong financial freedom by building long-term working relationships based on mutual

I provide workshops focusing on topics such as financial planning and personal wealth management, college and retirement planning, tax strategies and investment fundamentals, and special needs estate planning. Serving as your financial advisor is important to me. I appreciate the trust placed in me as we work together to reach your financial and estate planning goals. Feel free to contact me with any questions or to let me know how I may be of service.

achieve lifelong
financial freedom

Gordon F. Homes Jr. CLU, ChFC, CFP®

- CERTIFIED FINANCIAL PLANNER™ professional
- Special Care Planner
- Registered Representative of MetLife Securities, Inc.
- Registered as an Investment Advisor Representative

FINANCIAL SERVICES

Financial Planning
 Special Needs Estate Planning
 Investment Planning
 Insurance Planning
 Retirement Planning
 Estate Planning
 Business Planning
 College Education Funding

PROFESSIONAL AFFILIATIONS

Financial Planning Association
 Indianapolis Estate Planning Council
 National Assn. of Insurance & Financial Advisors
 MDRT Foundation

FINANCIAL PRODUCTS

Stocks and Bonds
 Mutual Funds
 Annuities
 Life Insurance
 Disability Income Insurance
 Long-Term Care Insurance
 MassMutual Financial Group is a marketing name for Massachusetts Mutual Life Insurance Company [MassMutual] and its affiliated companies and sales representatives. Gordon F. Homes, Jr is a MassMutual Financial Group is a marketing name for Massachusetts Mutual Life Insurance Company [MassMutual] and its affiliated companies and sales representatives. Gordon F. Homes, Jr is a registered representative of and offers securities, investment advisory and financial planning services through MSI Financial Services, Inc. Member SIPC.

COMMUNITY INVOLVEMENT

ASK (About Special Kids)
 Autism Advocates of Indiana
 Autism Society of Indiana
 Autism Society of Kentuckiana
 Best Buddies Carmel Dad's Club Special Sports
 Brain Injury Association of Indiana
 Council on Developmental Disabilities
 D.A.D.S. (Dads Appreciating Down Syndrome)
 Down Syndrome Indiana
 Down Syndrome of Louisville
 Down Syndrome Family Connection
 East 91st Street Christian Church
 Family Voices Indiana
 FEAT of Louisville
 FUSE (Families United for Support and Encouragement)
 Hamilton Boone Madison Special Services Coop
 Indiana Foster Care and Adoption Association
 ICASE (Indiana Council Administration of Special Education)
 Indiana Government Council for People with Disabilities
 INSOURCE
 Indiana School for the Blind and Visually Impaired
 Indiana Schools and Special Education Coops
 Janus Developmental Services
 Johnson County Autism Support Group
 NAMI (National Alliance for Mental Illness)
 Riley Hospital at IU Health
 Southeast Christian Church
 The Arc of Indiana
 The Arc of Kentucky
 UCP Association of Greater Indiana
 Westside Special Needs Network

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