

# Shirley White-Stevens

*A goal without a plan...  
is just a wish*



**investment**  
SERVICES CENTER



## Shirley White-Stevens

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**Certified Financial Planner™**  
**Certified College Planning Specialist**  
**Registered Financial Consultant**

## Why Shirley?

- \* Caters to all Individuals & Families
- \* College Funding Expert
- \* Full Portfolio Development
- \* Competent
- \* Integrity Based
- \* Independent
- \* Many Satisfied Clients
- \* Excellent Communicator
- \* Trustworthy
- \* Understands Women Entrepreneurs

## Shirley's Client Commitment

"Helping you build your resources and preserve your assets – that's my business and my commitment to you. I do this by researching and finding opportunities that work best for my clients given the environment of our times. You are very unique with different challenges and different portfolios. I place a high level of significance on your friendship and trust – something I strive to earn each and everyday."

## About Shirley White-Stevens

Shirley White-Stevens is a **Certified Financial Planner Practitioner and Certified College Planning Specialist**. Her goal is to help families who do not qualify for need-based financial aid to reduce the overall costs of private school and college and to ultimately be able to save more money for retirement. She also specializes in comprehensive financial planning, insurance planning and the needs of the entrepreneurial and professional woman.



Shirley has been a keynote speaker at numerous meetings and workshops for businesses, credit unions, churches and professional organizations in the Dallas area. She has authored numerous articles on educational funding, and serves as an advisor for the NICCP and savingforcollege.com. Shirley has been selected as one of "America's Top Financial Planners" by the Consumers' Research Council of America for the years 2006 - 2008.



Involved in her community, Shirley was awarded the **Collin County ABWA Woman of the Year in 2003 & has served as Minister of Music and Arts** at Christ the Servant Lutheran Church in Allen, TX. She holds degrees from Ursinus College and has completed graduate work at Temple Medical School and the University of North Texas.

## Services

- \* Financial Planning
- \* College Planning
- \* Retirement Plans & Rollovers
- \* Mutual Funds, Stocks, Bonds
- \* 529 Plans & Coverdell
- \* Variable Annuities
- \* REIT's
- \* Estate Planning
- \* Life, Health & Disability Insurance
- \* And much, much more . . .

[www.swhitestevens.com](http://www.swhitestevens.com)