The Armstrong Purselley Team

Brian Armstrong, CFP®, CRC Vice President – Investments & Wealth Advisor

Brian is the co-founder of Armstrong Purselley Wealth Management Group, operating under FFEC. He earned his Bachelor of Science degree from Texas A&M University in 1993 and began his career in the financial services industry with Ackley Financial in 1998. He then moved to a large independent financial advisory firm where he spent the next eight years. Brian's financial planning experience is focused in the areas of retirement planning and wealth transfer. He and his business partner are often asked to speak to employees of large corporations regarding their company's retirement benefits and their options at retirement. He has written and published financial articles for newspapers across the country and has appeared on Fox 4 News as a source of financial advice. Brian has served on the Board of the Longhorn Council, Boy Scouts of America, and is an Eagle Scout himself. He is an active member of Westhill Church of Christ and enjoys hunting, fishing, coaching soccer and spending time with his wife, Angie, and their four children.

Shawndi Purselley, CFP®, CRC Vice President - Investments & Wealth Advisor

Shawndi is the co-founder of Armstrong Purselley Wealth Management Group, operating under FFEC. She graduated Cum Laude from the University of North Texas Professional Development Institute and attended the College for Financial Planning. Shawndi began her career at Southwest Bank in Fort Worth and later moved to a large independent financial advisory firm where she spent the next nine years. Shawndi's financial planning experience is focused in the areas of retirement planning and wealth transfer for women. She and her business partner are often asked to speak to employees of large corporations regarding their company's retirement benefits and their options at retirement. Shawndi has also written and published financial articles for several newspapers. She is a former committee member of the Financial Planning Association and has held a board position for the Dallas Chapter as the education chairperson. Shawndi and her husband, Jimmy, live in Burleson with their four children. Shawndi's oldest daughter is attending The University of Texas at Arlington.

Justin Gedlen - Wealth Advisor

Justin earned his Bachelor of Science degree from The University of Wisconsin-Madison before relocating to Texas. Prior to joining our team, Justin worked for a large insurance company as a Financial Representative. He then spent two years as a paraplanner working with two CFP ® practitioners. Justin's experience lies in Comprehensive Financial Planning with a focus on retirement planning. In addition to meeting with clients, Justin is in charge of gathering data and preparing our comprehensive financial planning reports. He also oversees all of our special projects, seminars and marketing operations. Justin enjoys golfing, live music, reading and cheering for the Green Bay Packers.

Heather Edwards – Client Relations Coordinator

Heather began her career with an independent financial advisory firm where she worked as Brian and Shawndi's assistant for eight years. She then moved to Morgan Stanley Smith Barney and worked as a Client Service Associate for the next two years. Heather is an expert in communicating with investment companies, completing paperwork and understanding their procedures. In addition, she handles client inquiries and prepares Brian and Shawndi for client meetings. Heather lives in Fort Worth and enjoys spending time with her husband, Daniel, and their son Braylon. We are proud to have Heather back on our team.

Your Retirement Planning Begins Today

From the left: Justin Gedlen, Shawndi Purselley, Heather Edwards, and Brian Armstrong

With over 35 years of combined experience in the financial services industry, Armstrong Purselley Wealth Management Group actively manages over $65 million in client assets and has been providing trusted financial advice to the Dallas Fort Worth area for over a decade.

Our Philosophy

Effective communication is the cornerstone of a lifelong relationship. Concurrent with managing your life savings, Armstrong Purselley makes education a core part of our service by helping you understand what is happening with the economy and the impact on your portfolio. Our objective is to help you achieve your long term financial goals, regardless of market conditions. We invest your portfolio according to age, goals, risk tolerance, income needs and time horizon. With a limit on the number of client relationships handled by our firm, you are not just another number. Your own investment counselor, not a "back office support team," is who you will hear from on a regular basis.

Armstrong Purselley
Wealth Management Group

Prepare For What's Ahead With Professional Advice

www.armstrongpurselley.com

Our Retirement Income Planning Process

One of the biggest risks retirees face today is not having enough money to last throughout retirement. Many times individuals underestimate the length of time they will need their portfolios to provide income, as well as overestimate how much money can safely be withdrawn.

The best time to start the retirement planning process is before you need the money. How and where you save will have a direct impact on how you tap into those assets when you need them.

Address the Risk of Outliving Your Assets

- Prioritize your savings among taxable and tax-deferred options
- Evaluate appropriate options regarding your 401(k) and/or pension at retirement
- Design a plan for cracking open your nest egg based on your current and future needs
- Discuss other issues such as estate planning, insurance and long-term care needs

Our Financial Planning Process

- Discover the goals surrounding yourself, family and community
- Identify the appropriate risks around your goals
- Develop customized investment policies designed to meet your goals
- Monitor and report your progress toward achieving each of your goals
- Stay current with your changing life and present better solutions (when available) for you to consider

Our Investment Selection Process

- Design portfolios to address different goals and risks
- Incorporate investor psychology into building investment solutions
- Utilize goals-based investment processes
- Employ automatic rebalancing strategies where appropriate
- Offer tax management strategies
- Re-allocate as goals and risk tolerance change

Our Services

Pension Evaluation

401(k) Evaluation

Current Investment Evaluation

Pre-Retirement Planning

Comprehensive Financial Planning

Investment Implementation

Ongoing Financial Reviews

Property and Casualty Insurance

FDIC Insured Banking Services

Life Insurance

Disability Insurance

Long-Term Care Insurance

Free Ongoing Educational Workshops

Online Client Account Aggregation

Online Virtual Document Filing

Meeting Locations

Dallas

Fort Worth

Cleburne

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