



Financial Service Group, Inc. is a Family Friendly Workplace

Contact Information:

4812 Northwestern Avenue

Racine, WI 53406

262-554-4500

www.toyourwealth.com

Overview

Financial Service Group was started in 1981 by Michael Haubrich, who continues as the firm's president today. A nationally registered, fee-only financial and investment advisory firm, Financial Service Group specializes in Financial Life Planning, Retirement, Estate and Tax Planning, and Wealth Management.

Unlike brokers and others in the financial service industry who earn their pay based on commission, FSG upholds a fiduciary standard that, by law, places client interests first. That means the focus isn't on selling financial products but on ensuring clients have a financial plan in place that brings peace of mind about their retirement, estate, tax and wealth management planning. FSG's intent is to serve as a client partner before, during and after inevitable life transitions.

Financial Service Group, Inc. prides itself on creating and sustaining a family-friendly working atmosphere.

An avid proponent of work+life fit, Mr. Haubrich offers his employees flexible scheduling and alternative work locations. On-site advantages for employees include a fully-stocked kitchen, workout facility and children's play room housed in a brand new office building which opened in July 2008. The 7,000 square foot building affords the added advantages of spacious private offices and semi-private work areas, a state-of-the-art training center and a comfortable main lobby where clients and employees are made to feel welcome in a home-like atmosphere.



So central is the idea of being a model of effective work+life fit in practice that a primary on-going strategic objective included in the firm's overall business strategy is to "foster, promote and encourage FSG's best place to work environment." This strategic intent supports the company's stated values of commitment, compassion, integrity, excellence and shared responsibility.

References

Name	Relationship to FSG	Contact information
Terri Larson	Joined FSG in 1996 firm's office administrator	262-554-4500 x 102
Justus Morgan	Joined FSG in 2003 Vice president, senior planner, shareowner and certified financial planner (CFP)	262-554-4500 x 101
Pam Kassner	3+ year public/media relations consultant to the firm	414-510-1838
Cali Yost	Friend and work+life advocate; owner of Work+Life Fit, Inc; <i>Fast Company</i> blogger, author of <i>Work+Life: Finding the Fit that's Right for You</i>	800-277-3549 or 201-572-6033 (c) www.worklifefit.com

Attention to Employees' Individual Needs

Financial Service Group, Inc. contracts with a professional employment organization (PEO) to provide best-in-class human resource consulting and benefits administration. Employees are offered a customized benefits package based upon their individual and family needs. Benefit choices include options for health care, vision, dental, childcare, tuition reimbursement, professional memberships, and conference attendance. The program offers the flexibility of adding other benefits as determined by the employee's situation. In keeping with



the focus of being family-friendly, FSG maintains openness to discussing the current and future benefit needs of its employees.

Caring for the Whole Family

Caring for dependent children and/or aging parents is something that impacts workers everywhere. At Financial Service Group, they apply the same care and concern to employees as they do to clients who are experiencing special circumstances or extended need for care for their children or parents. Employees are offered work friendly schedules that allow them to work from home or from other locations as needs arise and are encouraged to be active, engaged participants in their children's school and extracurricular activities.

Working Hard and Having Fun

The FSG office center features a playroom where employees' children can come and spend some quality time with their mom or dad. Pizza parties, holiday decorating events, complete with good-natured *Guitar Hero* competitions, and other special events involve not only the employees but also their families. Visit the fully-stocked kitchen on any given day and you'll be likely to find an employee enjoying lunch or early dinner with a family member of any age.

In 2008, the entire staff, their spouses and children were invited to a two-day strategic planning session held at the beautiful Pointe Hilton Tapatio in Phoenix, Arizona.

A long-time sponsor of Racine youth basketball, Financial Service Group recognizes the important role young people have in paving the way for future innovation and creativity and are proud to support healthy lifestyle activities and values.



Focusing on Personal and Professional Development



FSG employees have benefited from company sponsored involvement with in professional growth opportunities and Justus Morgan is a graduate of Leadership Racine, and past board member of Young Professionals of Racine.

Additionally, the firm promotes on-going team development and partners with Corporate Resource Development to focus on skills such as more effective teaming and understanding communication styles, and programs such as *Integrity Selling*, *QBQ: The Question Behind the Question*, geared for staff and organization development. The costs of these programs are borne by the firm.

FSG offers tuition reimbursement for staff and pays membership dues for professional associations and conferences to ensure on-going personal and professional development.



Partnering With You Through Life's Transitions

FINANCIAL
SERVICE GROUP INC.

Registered Investment Advisory Firm



The foyer at Financial Service Group, Inc., complete with comfortable furnishings and an inviting fireplace, welcomes employees, clients and visitors to a cozy, home-like atmosphere.



FSG vice president, Justus Morgan and his wife represent the firm at a Health Care Network Western-theme fundraising event. Financial Service Group, Inc. is a financial sponsor of Health Care Network, a recipient of the firm's Referral Incentive Program along with San Juan Diego School and the University of Parkside Benevolent Foundation.

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A Fee-Only Financial Advisory Firm



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The spacious, convenient kitchen at the FSG Office Center allows employees to enjoy down-time with all the conveniences of home. Like in most home settings, the kitchen becomes a place for the team to socialize and meet in casual comfort.



Promoting healthy lifestyles, Financial Service Group's building features a workout center that offers cardio and strength building equipment. A personal trainer comes to the office monthly to work with individuals seeking her 1:1 service for a fee. The fitness center is a no-cost advantage to employees and their families.