Douglas R. Thorpe, CLU, ChFC

CERTIFIED FINANCIAL PLANNER™

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Value Statement

Bennon & Thorpe LLC is a private, independent financial services firm focusing on lifestyle, wealth and risk management. We provide comprehensive financial planning solutions for retirees, doctors, engineers, and small business owners just to name a few. Through a comprehensive planning approach we help provide options and solutions for our clients in today's challenging environment.

As a CERTIFIED FINANCIAL PLANNER™ practitioner, I am bound by a Code of Ethics and Practice Standards to put my clients' interests ahead of my own personal interests. In my role as a CFP® practitioner, I provide each client with objective and transparent advice.

Financial Planning Approach

I work with you to develop solutions and strategies to help grow, protect, and transfer your wealth. My recommendations are personally tailored to each individual client.

- *Establish & Define Client-Planner Relationship*— Initial meeting to determine goals, objectives, and comfort level.
- *Gather Data* — Once I am hired, I have an extensive meeting to gather all pertinent data to enable me to build your plan.
- *Analyze & Evaluate* — Once the data is gathered, I spend time analyzing and evaluating it to determine the appropriate plan and path.
- *Develop & Present Planning Recommendations* — After careful review, I outline options to show the client various "roadmaps" to help them to their end destination. From an investment standpoint, this includes active and passive management, core and satellite investment philosophies, and strategic and tactical asset allocation planning.
- *Implement* — Once the client decides which recommended strategy they like, we begin implementing.
- *Monitor & Measure Plan's Progress* — Periodic review schedules are established to monitor and measure the plan's progress. This allows changes to the plan to be made over time and allows the clients to continue focusing on the end goal.

Experience

I began my career in financial services in 2001 and I plan on being in this field throughout the duration of my career.

Education

- Marietta College (2001), Bachelor of Arts in Business Management & Marketing and a minor in Finance
- The American College (2004)
  - Chartered Financial Consultant (ChFC) designation
  - Chartered Life Underwriter (CLU) designation
- Certified Financial Planner Board of Standards, Inc. (2008)
  - CERTIFIED FINANCIAL PLANNER™ practitioner
- FINRA Series 6, 7, 24, & 63 licenses
- Life Insurance & Annuity licenses

BENNON & THORPE LLC
An Independent Financial Advisory Firm

Douglas R. Thorpe, CLU, ChFC

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Professional & Civic Organizations

- Member, Financial Planning Association
- Member, Society of Financial Service Professionals
- Member, Mid-Ohio Valley Estate Planning Council
- Member, Mid-Ohio Valley Economic Roundtable
- Qualified Member, Million Dollar Round Table (MDRT)
- Member, St. Andrew's United Methodist Church, Finance Committee

Personal Information

I currently live in Vienna, WV with my wife, Leah, our son, Carter Douglas and our daughter, Addison Elizabeth. My interests outside of work include spending time with my family, golf, basketball, reading, running, traveling, and Ohio State football.

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