

NOLAN BAKER'S BIO

Nolan Baker, Investment Professional



Military Veteran and founder of Retirement Specialists of Northwest Ohio, Nolan Baker has dedicated his career and life to helping to protect the financial freedoms of seniors, retirees, and Boomers across America. An avid believer in education, Baker strives to inform community members on the importance of having a strategic plan for retirement and thereafter, through his educational workshops, also known as Financial *Freedom* Forums. Through his community outreach, Baker exposes the dangers of having an under-planned retirement and defines the strategies needed to help make a retirement successful. His unique approach to comprehensive financial planning can be attributed to the structure he learned during his military training. He implements a custom approach specific to each of his client's personal and monetary objectives.

Coined as the Independent Income System, Baker accounts for the expected and unexpected variables of retirement and defines the strategy required to help make the retirement plan as successful of a mission as possible. The TEAM approach he teaches at their national headquarters, The Retirement Resource Center in Maumee, Ohio, focuses on avoiding traps and taking advantages of opportunities in the areas of Taxes, Estate Planning, Asset Protection and Money Management.

Over the course of his career, Baker has defined his role as an investment professional by specializing in the areas of retirement planning including the "de-accumulation" of a retirement savings, transitioning into retirement, asset reallocation, estate and legacy planning, and multi-generational IRAs. He also serves niche populations that have government specific retirement plans including Ohio teachers, U.S. postal workers and railroad workers. Baker also works with U.S. Veterans and their families in helping them take part in the government benefit program, Aid and Attendance, in an effort to "give back" to his country and community.

The Retirement Guys, aka The Retirement Guys Network and the Retirement Specialists of Northwest Ohio (formerly Baker Financial Group) was founded by Baker in 1994, an independent retirement planning practice with the purpose of developing advanced planning retirement strategies in the areas of investment planning, money management, income and distribution planning, and eventually teamed up with estate planning attorney, Mark Clair to provide his clients with estate and legacy planning services. Together Baker and Clair have defined their core strength as advanced retirement planning and progressive estate planning specialists, and assist all retirees with developing and implementing comprehensive retirement plans that will help to protect their client's financial freedoms throughout retirement. In addition to speaking at community and national education events, Baker and Clair host *The Retirement Guys* radio show and are columnists with the goal of sharing with those they don't directly work with, how to ensure their financial freedom is protected.

Throughout Baker's career he's been acknowledged as a leader in the Toledo for his outstanding commitment to his clients, profession and community contribution. He was a nominee of the Torch Award *for Market Place Ethics* from the Better Business Bureau and nominee for the Toledoan of the Year Award, *along with being recognized locally in the Top 20 Under 40 awards*. He was also an annual sponsor of *Junior Achievement* from 2000 - 2005 and plays an active role with the Boy Scouts of America as past Northwest District Finance Chairman for the Erie Shores Council and headed of operations for more than 1,400 Boy Scouts. He also is the Den Leader for Pack 101 in Waterville, Ohio helping teach his son and many other youths the values of Scouting. Baker is an Investment Professional and fully Licensed Agent. He received his Associate Degree in Financial Management Technology from Owens College in 1998, as well as attended the University of Toledo.

Nolan Baker and his wife Karen live in Waterville, Ohio with their two sons. They enjoy traveling and boating and often spend the summer weekends at Lake Diane. Karen also works with Nolan and runs the operations at The Retirement Guys. The perfect weekend for the Baker's is relaxing and spending time with family and friends. They are Christians and belong to Cedar Creek Church in Whitehouse, Ohio.

THE RETIREMENT GUYS The Retirement Resource Center of Northwest Ohio

1700 Woodlands Drive Maumee, OH 43537 Telephone (419) 842-0550 Toll Free (866) 442-0550 Fax (419) 794-0539 www.retirementguysnetwork.com

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THE RETIREMENT GUYS

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NEWS-TALK
1370 WSPD
WHERE TOLEDO COMES TO TALK

TOLEDO
FREE PRESS
A tradition for Toledo's future



Nolan Baker – Columnist, Talk Show Host, Investment Professional, Educator

Professional Positions:

- Licensed Agent – February 1994
- Licensed Investment Professional – June 1997

Community Programs and Featured Speaking Engagements:

- **Junior Achievement** – Sponsor of high school students to teach them how to setup and run a successful business: 2002 – 2007
- **Boy Scouts Of America** – Erie Shores Council – 2006 and 2007 Northwest District Finance Chairman Through this charitable organization I oversee the financial operations and budget for over 1400 local Boy Scouts.
- **Speaking Events -Senior Market Advisor**, Senior Market Expo National Speakers, Las Vegas, August 2009, 2010 and featured speakers in 2011, **National Educational Conference**, Houston, Texas, Presenters, May 2011, **National Business Institute**, Presenters, May 2009, **Ohio Education Association Mega Conference**, Speakers, February 2009 April 2009. **WE2 Investment Advisory Group**, Investment Advisor Representative Meeting, Tampa, February 2010. **Center for Successful Aging, Medical University of Ohio / Area Office on Aging**, Kick Off Speaker, November 6th, 2006, Area Office on Aging, The Cost Of Caregiving, Key Note Speaker, September 2007, **Toledo Board of Realtors**, October 2008 Monclova Senior Center, Bryan Senior Center, Montpelier Senior Center, Lymann Liggins Senior Center, J. Ford Senior Center, Monclova Community Center, Adult Retiree Center, Lucas County Rec Center Senior Citizens Day, Community Development Center, James Hancock Senior Center, COSI Senior Day, Central Park West, Maumee Senior Center, The Pinnacle, National Educational Conference, NFISCO Summer Gala, 4Ward Marketing Challenge

Financial Talk Shows:

- **Retirement Guys Radio Show** – Saturdays at 1 PM on 1370 WSPD, Toledo, Ohio 2003 – Present
- Money Talks – Weekly on 1230 WCWA AM, Toledo, Ohio. Financial Radio Show Co-Host: 2000-2001
- Money Talks – Weekly on 1330 WFIN AM, Findlay, Ohio. Financial Radio Show Co-Host: 2000-2001
- The Nolan Baker Show – Weekly on 1520 WQCT AM, Bryan, Ohio. Financial Radio Show Host: 2002-2003
- Wealth Management Wednesday – Weekly on 1230 WCWA, Toledo, Ohio. 2003
- The Morning News Show - The second Wednesday of every month on 1520 WQCT, Bryan, Ohio 2004 to 1, 2006

Featured Publications And Interviews:

- **The Toledo Free Press** – Weekly Columnist for Lucas and Wood County's largest Sunday newspaper with a 100,000 circulation.
- **The Toledo Free Press** – Cover Story - Things aint like they used to be - interview with Suze Orman, Mark Clair and Nolan Baker, March 18, 2011

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- **Senior Market Advisor Magazine** – Nolan was featured as the cover story “The New Wave Of Advisors”, November 2009 and has since been a regular contributing columnists.
- **Boomer Market Advisor Magazine** – Nolan was featured on page 24 and 25 discussing advanced investment vehicles, August of 2009.
- **The Toledo Blade** – Sunday, May 30th, 2004 – Retirement strategy needs sharper focus, Front and Second Page of the Business Section
- **PR Buzz.com** – Retirement Guys Celebrate Decade over the Airwaves
- **Finance.bnet.com** – Retirement Guys Celebrate Decade over the Airwaves
- **Execdigital.com** – Retirement Guys Builds Relationship with Habitat for Humanity
- **Silobreaker.com** – Retirement Guy Unite Nationwide
- **Finance.Boston.com** – Retirement Guys Network Pays If Forward at Seagate Food Bank
- **The Bryan Times** – Tuesday, November 16th, 2004 - Nolan R. Baker, CSA will be the featured speaker at the Bryan Senior Center, People In The News Section
- **The Bryan Times** – Tuesday, February 01, 2005 – Nolan R. Baker, CSA will be the featured speaker at the Montpelier Senior Center, Community Calendar
- **Homes 4 Sale by Owner Network Magazine** – July 2006 Issue – Focus on Finance with Nolan
- **NEXT News** – Summer 2006 – Why I’m Next
- **USA Financial** – National Field Marketing Organization, Winners Circle Audio CD Series.
- **WTO5 Toledo’s CW** – March 2007, 9 Little Known Money Traps
- **Buckeye Cable** – August 2007, Step Up Toledo
- **WTOL Channel 11** – August 2008 and October 2009 Your Saturday Morning News ,
- **WTOL Channel 11** – May 2010 11 p.m. news – Type of Day Investors Should Be Prepared For

Military Service:

- **United States Marine Corps** Reserve: Electrician, Generator Operator, and Rifleman: June 1994 – November 1998
- November 1998 received Honorable Discharge from the United States Marine Corps.

Education / Accomplishments / Memberships:

- Nominated for the 2006, 2007, 2008, & 2011 Better Business Bureau Torch Award for Market Place Ethics.
- Nominated for the 2006 Toledoan of the Year.
- Nominated for the 2010 and 2011, Top 20 Under 40.
- Selected by Owens Community College Alumni for their Profiles Of Excellence recognition program, 09/11
- University of Toledo: General Studies: September 1994 – 1996
- Owens College: Financial Management Technology 1996-1998, Associates Degree in 12/1998

Need a Quote for your Article or a Speaker at your upcoming event?

Call Toll Free To 1-866-442-0550 to contact Nolan Baker

www.retirementguysnetwork.com

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