

With more than 75 years combined experience in the financial industry, the partners of PlanFocus Financial Services are independent advisors helping clients manage their money. They are from left, Kevin Morgan, Carl Dekle and Dan Rollo.



## Financial Experts Keep an Eye on the Bottom Line

Many people only pay attention to their retirement funds and investments on the day their monthly statement arrives, opting instead for a financial advisor to keep a daily eye on interests and the bottom line. One firm doing just that is PlanFocus Financial Services, the Mobile Area Chamber's Small Business of the Month.

Located in Mobile and launched in 2010 by **Carl Dekle, Kevin Morgan and Dan Rollo**, PlanFocus Financial Services was created to help bridge the gap between the complex regulatory environment and the day-to-day running of a corporation's retirement plan. The company offers both individual financial planning as well as company employer

retirement plans for clients on both sides of Mobile Bay. The trio works with LPL Financial, the largest independent broker dealer in the country. "As independent advisors, we are free to choose the best solutions for our clients and are not asked to 'push' the latest product," said Dekle.

The partners have more than 75 years combined experience working with corporations and individual clients. Morgan's expertise lies in the education and client sector, Dekle specializes in corporate retirement planning and Rollo is the financial planner reviewing plans and projecting investments. They agree diversification is what sets the firm apart from other financial planning groups in the area.

"It's a very good combination for our clients, in that we can work together to listen to our clients and we also can each bring to the table our strengths and experience for their benefit," said Rollo.

The three say education is key to explaining and guiding clients about the importance of financial planning. "There is a tremendous amount of fiduciary risk associated with corporate retirement plans and our goal is to help corporations do what is in the best interest for their employees," said Dekle.

"We want to educate and give people good content they can easily understand," added Morgan. For more information, call 544-2400 or visit [www.planfocusllc.com](http://www.planfocusllc.com).

Go to [mobilechamber.com/awards](http://mobilechamber.com/awards) to submit a Small Business of the Month nomination, or contact Danette Richards at 431-8652 or [drichards@mobilechamber.com](mailto:drichards@mobilechamber.com).