

P O R T F O L I O

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**Additional design samples, writing samples and references
are available on request.**

More information at www.mktondemand.com.



Annual Report
Concept
Copywriting
Custom Photography
Graphic Design
Project Management



CLIENT

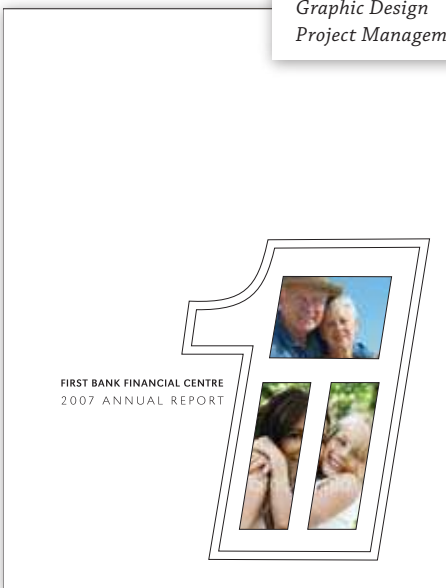
First Bank Financial Centre - Oconomowoc, WI
(7 branches in SE Wisconsin)

SERVICES PROVIDED

Write and design 2007 Annual Report. Investment services collateral, Express Deposit logo and collateral, rack cards, displays and posters.

CHALLENGE

Communicate First Bank's commitment to the community.



Helping Physicians Reach Their Financial Goals



INTEGRATED FINANCIAL SOLUTIONS LLC
IFS | WEALTH ENGINEERING

Creative financial advice for health-care professionals:

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- Asset Protection and Planning for the Future
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Download our free white paper:
"Critical Financial Considerations for Physicians Dealing with a Practice Buyout"

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INTEGRATED FINANCIAL SOLUTIONS LLC
709B N. MILWAUKEE ST. DELAFIELD, WI (262) 646-3549


Brion S. Collins and Todd W. Stok are registered representatives of and offer securities, investment advisory and financial planning services through MML Investors Services, Inc. 525 Junction Rd., Suite 8100 North Tower, Madison, WI 53717. (608) 829-0015. CRN 202910-095070



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PH 262-646-3549 FAX 262-646-3587
WWW.IFSFINANCIAL.NET

INTEGRATED FINANCIAL SOLUTIONS LLC
IFS | WEALTH ENGINEERING

Helping Physicians Reach their Financial Goals



Our Services
Helping physicians and other professionals make the most of their personal financial lives is the mission of IFS. We are a fee-based, comprehensive financial planner. We can help you put together the complex pieces of your financial life with our unique process of **Wealth Engineering**.

Wealth Engineering encompasses one or all of the following areas:
Integrated Advisory Services: Comprehensive Financial Planning

- The creation and implementation of a fee-based, comprehensive plan
- Thorough analysis of your situation and goals
- Preparation of a written plan and timeline
- Regular, ongoing assessments to help your plan stay on track with your goals

Integrated Portfolio Management:
Asset allocation design and investment solutions

- Management of your portfolio using a variety of investment tools, such as private money manager referral programs and product placement such as mutual fund share purchases.
- Minimum portfolio size of \$500,000 - waived for integrated advisory service clients.

Integrated Risk Management:
Advanced estate and business planning insurance design and products

- Insurance solutions for advanced business and estate situations, most often at the recommendation of an estate attorney or tax accountant.
- Risk management assessments available for individuals and businesses, offered on a fee basis.
- Consult your tax and legal advisors regarding your individual situation.

More information:
www.IFSfinancial.net

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Strong Partners
Delafield is home to one of the country's top financial planning partnerships.

INTEGRATED FINANCIAL SOLUTIONS LLC
IFS | WEALTH ENGINEERING

Brion S. Collins, CFP®
Financial Planning Advisor

Todd W. Stok, CFP®
Financial Planning Advisor

INTEGRATED FINANCIAL SOLUTIONS LLC
IFS | WEALTH ENGINEERING

CLIENT

Integrated Financial Solutions - Delafield, WI

SERVICES PROVIDED

Brand repositioning, logo refresh, re-design client communications, local and national public relations, direct mail, print advertising, DVD.

CHALLENGE

Communicate fee-based financial planning benefits; differentiate IFS in crowded market.

JP
JACOBS PEIRICK
KITCHEN DESIGN STUDIO

YOUR COUNTERTOP Concierge

At JP Kitchen Design Studio, we know that choosing countertops is no easy feat. If you can't tell a bullnose from an ogee, it can be downright confusing. That's why we believe in offering full service remodeling advice to our customers.

You can count on JP Kitchen Design Studio to help you select the right countertop for *your* kitchen. We'll be there every step of the way - from the initial design concepts to helping you coordinate your countertop with the rest of your home's decor. That's more than the big box retailers can say.

We want to earn your business by offering experienced, professional advice along with a comprehensive selection of all countertop materials. Give us a call to see how our countertop concierge can help *you* design a beautiful kitchen. Our very own Sean Jacobs, TheCountertopGuy.com, is a professional speaker to the countertop industry and an expert on all countertop surfacing options.

How do we compare?

COUNTERTOP FEATURES	JP Kitchen Design Studio	Home Depot
Quartz brands	9	1
Quartz colors	300+	57
Granite brands	-	-
Granite colors	250+	67
Stone edge profiles	Up to 7 included	1 included
Solid surface brands	10	2
Solid surface colors	500+	161
Solid surface edge profiles	6 included	2 included
Green, eco-friendly options	14	-
In-home selection assistance	Yes	No
Free samples	Yes	No
Supervise measure/template	Yes	No
Supervise installation	Yes	No
Extended service	Free lifetime enhancement plan	For fee service call

www.jp-kitchenstudio.com | 262.560.1200

JP
JACOBS PEIRICK
KITCHEN DESIGN STUDIO


design elements



CABINETS
Legacy semi-custom; cherry natural finish; Lexington doors; clear glass cabinets

CABINET HARDWARE
Oil-rubbed bronze; 70R8 pulls, 75R8 knobs

JP
JACOBS PEIRICK
KITCHEN DESIGN STUDIO



My Kitchen

Remodeled kitchen in the home of Bill & Kathy Burtaki, Oconomowoc

CABINETS | COUNTERTOPS | LIGHTING
WOOD FLOORING | TILE | SMART HOME TECHNOLOGY
CUSTOM CABINETRY | INTERIOR DESIGN

Call **262.560.1200** or visit **www.jp-kitchenstudio.com**
Across from Olympia in the Summit Center Marketplace
1288 Summit Ave. Suite 110, Oconomowoc

CLIENT

JP Kitchen Design Studio - Oconomowoc, WI

SERVICES PROVIDED

Brochure, quarterly newsletter, national and local PR, studio displays, direct mail, print advertising, web site.

CHALLENGE

Introduce new kitchen design firm to the market and differentiate JP from big box stores.

Building Your Best Life



COMPREHENSIVE FINANCIAL PLANNING

6 Six Reasons to Work with a Financial Professional



If you're the most people, you probably bring your own expertise to a professional financial planner. You know what you have, and you know what you need.

concerns about your health, and for negative reasons. When the need for legal counsel arises, professional assistance is all it takes to get the job done. It's no different when it comes to personal finance—most people would benefit from working with a financial professional. Here are six good reasons to do so.

1. You don't know what you don't know

He was not an expert on every subject. Managing your finances and the money that is your life, implementing comprehensive financial plans to fund your retirement while getting paid, funds for your child's education is something else. That doesn't mean that you're incapable of doing it, only that your planner's understanding the expertise needed to put together an effective plan. If you're going to get it done, you'll need to be able to plan, and that brings us to the next point.

2. You have good intentions, but never act on them

There's no secret strategy built around providing individuals with the tools they need to do their own financial planning. Books, magazines, websites, calculators, worksheets, and other self-help resources can be a great starting point, but they don't provide the expertise needed to take a comprehensive view of your financial future, whether they're working alone or with a financial professional. Not one of these tools, however, will help you put your assets to work for you to see the full picture, and the time to apply the full to your own situation. Working with a financial professional helps you to stop procrastinating and allow the time commitment from you to the professional.

3. Doing it all yourself isn't efficient

There's a long list of things that we could do ourselves but instead choose to pay someone else to do for us. For example, you could paint your house, but hiring the pros to get the job done is usually a lot less expensive. You can work on your own, but it's usually more efficient to have someone else do it for you. It's the same with financial planning. It's not surprising that we have heard and better than if you did it yourself. The same goes for working with a financial professional.

4. You're not objective

It's hard to look at your own situation objectively. Having someone else with experience manage your financial situation can be extremely helpful. And, in cases where you and your spouse aren't on the same financial page, a financial professional can help to both of your interests, identify underlying issues, and help you find common ground.

5. Keeping up with change is a full-time job

Last year, there were four major pieces of tax legislation signed into law. Just assuming financial professionals have had a difficult time keeping up with the changes. Not understanding how these changes might affect your financial plan could be disastrous. Just understanding the changes takes time and after-hours research (number 3).

6. You see the trees, but not the forest

A good financial professional can help you see the big picture. If you see the trees, how can you see the forest? For example, how saving for your child's college education might affect your ability to meet for retirement. If you see the trees, you may not see the forest. A financial professional can help you to prioritize your goals, implement specific strategies, and choose suitable products or services. A financial professional can also help you to put your plan to make sure it remains on track, recommending changes when conditions, or your circumstances, change.

John Massie is a registered representative of John Massie Financial Services, Inc. (JMSFI), a registered investment advisor and financial planning firm. JMSFI is a subsidiary of John Massie Financial Services, Inc. (JMSFI), a registered investment advisor and financial planning firm. JMSFI is a subsidiary of John Massie Financial Services, Inc. (JMSFI), a registered investment advisor and financial planning firm. JMSFI is a subsidiary of John Massie Financial Services, Inc. (JMSFI), a registered investment advisor and financial planning firm.

YOUR MONEY, YOUR LIFE

VOL. 1 | ISSUE 1 | FALL 2007



Lessons From the Lake

As a child, my father and I would go fishing every year at my uncle's cabin on Lake Superior in the Upper Peninsula of Michigan. One year, my uncle "Dad" decided to build a new boat. He was a top notch diver, but he was a horrible mechanic.

That story has stuck with me for over 30 years. My uncle knew just enough about a lot of things to get himself in trouble, and he was a top notch diver, but he was a horrible mechanic.

The same principle can hold true for your personal finance. Every day we are exposed to television programs, newspaper articles, magazines and "hot tips" that tell you what to do with your money. Other times we "hear" just enough to get ourselves into financial trouble.

In today's changing environment it is very difficult to try to stay on top of all the different aspects of your financial life. As a Certified Financial Planner,

Professional, my job is to help you to sort out all the noise and create a plan that is specific to you and your needs for the short and long term so that you won't have to find out the hard way what I've learned—that one minor adjustment might leave you stuck in the middle of the lake.

Jim Massie

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Fax: 262-573-6163
Email: jmassie@jmsfi.com



CLIENT

John Massie Financial Services - Waukesha, WI

SERVICES PROVIDED

Brochure and quarterly newsletter.

CHALLENGE

Communicate personal service and benefits of complete financial planning.

ROELL
CAPITAL MANAGEMENT LLC



ROELL CAPITAL MANAGEMENT LLC



Roell Capital Management LLC



CLIENT

Roell Capital Management LLC - Waukesha, WI

SERVICES PROVIDED

Presented four logo options for new business.
Produced business stationary and sales sheet.

CHALLENGE

Incorporate client's color preferences and create a distinguished identity.



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and free first year tuneup!
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Exp. 6/30/08. Not valid with other offers.



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1833 Executive Dr. Cincinnati
WWW.PATSHHEATING.COM
Turn to the Experts

Your Questions

Q: How can I save money on my air conditioning costs this summer?
A: With a preventative maintenance plan from Pat's Heating & AC.

Consider these facts:

- Just 1/100th of an inch of dirt on an evaporator coil can increase operating costs by 7%.
- A dirty blower wheel can reduce air flow by over 70%, causing the motor to run longer, requiring more energy consumption.
- An undercharged air conditioner can reduce efficiency by 32% and increase the chance that your compressor will fail.

Return line is preventative maintenance saves you money – and saves energy. Also, to keep your costs down, and if you can stay comfortable at a warmer temperature.

↓
Saving the average air conditioner owner
energy costs of up to 7%

Pat's Heating & Air Conditioning
262 567-7499

Comfortable Home

YOUR SEASONAL GUIDE TO CLEAN AIR AND INDOOR HOME COMFORT

1 Go Green with a Hybrid Heat Pump
2 Spring on Energy with a Hybrid Heat Pump
3 Summer Heat, Summer Savings
4 How to Save on AC Costs

Go Green with Hybrid[®] from Carrier

HYBRIDHEAT

SAVE on Energy Costs this Summer. Consider a HYBRID HEAT[®] Furnace and Air Conditioning System.

No hybrid. Don't just have heat wheels – you can take advantage of energy saving hybrid technology in your home, as well.

Carrier has a new HYBRID HEAT[®] dual fuel system that switches between electricity and gas to provide the most energy efficient way to heat AND cool your home.

And to help you save even more, Focus on Energy is providing a \$125 rebate valid through July 15, 2008 towards the purchase of a hybrid furnace and air conditioning system.

Pat's Heating & Air Conditioning
Turn to the Experts

Your Hometown Choice

Beat the heat this summer... with a new central air conditioner from Pat's Heating & Air Conditioning. Economowoc

\$100 Off
\$100 off any air conditioner and free first year tuneup!
Exp. 6/30/08. Not valid with other offers.

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Free Estimates
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Turn to the Experts

CLIENT

Pats Heating & Air Conditioning

SERVICES PROVIDED

Custom folder, newsletters, direct mail, print ads, web edits and SEO.

CHALLENGE

Distinguish Pat's from other HVAC dealers, "Hometown Choice".

THE PEEP OF SPRING'S FIRST FROGS... THE GOLDEN SHIMMER OF A MIDSUMMER SUNSET. COOL BREEZES AND GENTLE WAVES. THERE'S NOTHING LIKE LIVING ON THE LAKE. AND NOW THERE'S NOTHING LIKE LIVING AT LAKE SHORE PLACE, LAKE COUNTRY'S FINEST INDEPENDENT SENIOR LIVING COMMUNITY...



Lake Shore Place

A WEALTH OF ACTIVITIES

Lake Shore Place residents will enjoy our walking paths, boating and fishing, indoor exercise and enrichment classes, internet cafe, fine dining at The Clubhouse, a woodworking shop, and a beauty and barber shop.

A LIFETIME OF OPTIONS

Should the need arise, living at Lake Shore Place gives you priority access to on-site assisted living, skilled care and rehabilitation services. If you or your spouse have different needs for care, you're only a few steps away.

A CARING COMMUNITY

Lake Shore Place is part of Lutheran Homes of Oconomowoc, a not-for-profit retirement community on the shores of Lac La Belle. Welcoming all faiths, Lutheran Homes provides homes and services for seniors in a manner which reflects Christ's love.



We've found a place called home.



Welcome to Lake Shore Place,
Oconomowoc's finest independent living facility for seniors 55 or better. Lake Shore Place is part of Lutheran Homes of Oconomowoc.

Lake Shore Place offers:

- ❖ first-class independent senior living
- ❖ access to short term rehabilitation, memory care, or more extensive needs
- ❖ a vibrant community of friends

CALL FOR A FREE BROCHURE
(262) 560-9600
OR VISIT WWW.LHO.ORG



CLIENT

Lutheran Homes of Oconomowoc, Inc.

SERVICES PROVIDED

Conducted focus group. Write marketing plan and creative brief for new facility. Logo design. Begin advertising campaign.

CHALLENGE

Communicate benefits of active senior living facility without referencing "nursing home."

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CLIENT

Racine Marriott - Racine, WI

SERVICES PROVIDED

Graphic design services for a variety of collateral and advertisements.

CHALLENGE

Comply with national brand standards, yet create unique and compelling materials.