



the

# Sundance SCOOP

thank  
you!

## *A Note from Fred...*

*Our transition is 99% complete and I want to say thanks to our valued clients for making this possible. The following is an article that will be published in several local newspapers regarding our transition.*

*I wanted to take a moment and share the article with you first.*



NORFOLK, NE—When Stanton County native Fred Schellpeper was a teenager, he watched the movie *Butch Cassidy and the Sundance Kid* and the term Sundance stuck. The sun dance is a religious ceremony practiced by a number of Native American and First Nations Peoples, primarily those of the Plains Nations.

It's no surprise then in March 2014 Fred chose Sundance Investments as the name of his Ameritas Investment branch office he had been operating in Norfolk since 1999. Fred explains, "I like to think of Sundance in a way that encompasses many of the attributes and traditions that have been associated with the term. A fondness and deep respect for history and the greater good that stems from working together in one such thought. A focus on being free but realizing the responsibility that comes with it. Renewal of purpose and focus on things that matter today and tomorrow which guide us along the way as we travel down life's paths." Most importantly, Sundance Investments operates under the philosophy that trust is a given and that clients should be consulted, not sold.

Recently, Sundance Investments joined LPL Financial and WealthPLAN Partners out of Omaha. Fred explains, "After an exhaustive review of core client centered beliefs, business philosophy and outlook for the future, Sundance elected to make a change. Enhancements to technology, investment research, and total client experience were key drivers behind the move." WealthPLAN Partners believes that each investor has unique financial goals that change as they pass through the various phases of life—Accumulation, Preservation, and Distribution. They realize that being an asset management firm was not enough and that clients deserve superior quality financial planning services also. This fit right along with Fred's philosophy and work ethic. The move will bring together like minded financial services firms. Fred continues, "We want to help clients pursue their goals. Our entire staff is dedicated to making each client's needs our priority and we will always give a timely response as well as make it our mission to put forth maximum effort on their behalf. The best is yet to come."

Fred Schellpeper is a registered Investment Advisor Representative with WealthPLAN Partners and a licensed life and health agent in several states. He holds a Series 7 registration with LPL Financial and Series 66 registration with both LPL Financial and WealthPLAN Partners and has a Master's degree in Business. Fred has been in the financial industry for over 30 years. For more information, Sundance Investments can be reached at 402-371-4262. They are located in Norfolk at 100 North 34<sup>th</sup> Street, Suite F, Norfolk, NE.



# Did you know we offer a variety of insurance and investments products?

## Insurance

- Disability Income
- Life
- Group
- Dental
- Health
- Business
- Long Term

## Investments

- Bonds
- Annuities
- Stocks
- REITS
- Individual
- Mutual Funds
- Retirement Plans

### How much disability protection do you need?

Finding money to pay for your most basic expenses after an injury or sickness is certainly not a game you want to play! **At a minimum**, Disability Income Insurance should cover these important monthly expenses:

<b>G</b> roceries	\$ _____
<b>A</b> uto	\$ _____
<b>M</b> ortgage	\$ _____
<b>E</b> lectricity	\$ _____
<b>=</b>	\$ _____
<b>TOTAL</b>	\$ _____

With maximum disability income coverage, the average policy cost is between 1-3% of pretax income.

You may also want to consider having enough coverage to help cover the cost of loans, credit cards, health care, daycare and other insurance.

A **bond** is a debt security, similar to an IOU. Borrowers issue **bonds** to raise money from investors willing to lend them money for a certain amount of time. When you buy a **bond**, you are lending to the issuer, which may be a government, municipality, or corporation. Our investment specialist can help you determine if participating in bonds is right for you.



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**Kristin Spaulding**-Kristin is our business manager and has been with Fred for 9 years. She has been in the financial industry 8 years prior to joining Fred in 2007. You may reach Kristin by email at [kristin.spaulding@lpl.com](mailto:kristin.spaulding@lpl.com).

**Kati Novotny**-Kati is our insurance support specialist joining us in 2014. She has been in the insurance industry for twelve years before joining Fred at Sundance Investments and now specializes in all lines of individual & group insurance. You may reach Kati with all your insurance questions at [kati.novotny@lpl.com](mailto:kati.novotny@lpl.com).

**Deanna Wiegand**-Deanna is our retirement services assistant having also joined us in 2014. She had formerly been in the retirement industry three years before joining Sundance Investments. You may reach Deanna by email at [deanna.wiegand@lpl.com](mailto:deanna.wiegand@lpl.com).

Happy Mother's Day!



Happy Memorial Day!



Securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through WealthPLAN Partners, a Registered Investment Advisor. WealthPLAN Partners and Sundance Investments are separate entities from LPL Financial.

Visit our website at [www.sundanceinvest.com](http://www.sundanceinvest.com)

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