

# Is it time for your annual financial tune-up?

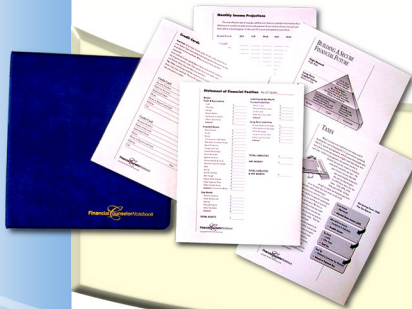
**Melissa Shaw** is a Certified Financial Planner specializing in financial counseling. She is the author of the **Financial Counselor Notebook**, a personal financial organizer that helps couples take control of their finances.

During her 40 year financial services career, Melissa has accumulated extensive insurance and investment knowledge. Together with her husband and business partner, Douglas Jones, CLU, ChFC, she works to provide her clients with financial knowledge, perspective and assistance in a safe and comfortable environment.



**Is your financial house in order?** Melissa Shaw, CFP® will work with you to develop your own custom Financial Counselor Notebook. She performs this service during a three hour interview in her Lake Forest office. She will help you prioritize and organize your financial affairs, review your goals and objectives, suggest ways to improve your cash flow, and address important net worth and retirement issues.

***The financial confidence you receive from having a clear financial picture is priceless. Call and schedule your financial tune-up today.***



Your financial counseling session with Melissa Shaw, CFP includes a **Financial Counselor Notebook** customized especially for you. The Financial Counselor Notebook contains nearly 50 pages of forms, worksheets, goal-setting ideas, tax and credit card information, and step-by-step instructions that bring clarity and insight to your financial decisions.

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26477 Rancho Parkway South  
Lake Forest, CA 92630  
**800-729-6344 x204**  
**949-699-1660 x204**  
melissa@jonesfinancial.com

JonesFinancial.com  
MelissaShawPlanner.com