



“In serving my client, I shall recommend the course of action that I would apply to myself in the same situation.”

H.E. “Buddy” Wootten, III

MS-CFP, CLU, CLTC
Vice President, Business Planning

Honors & Distinctions:

- Life and qualifying member, Million Dollar Round Table
- Member, National Association of Insurance and Financial Advisors
- Member, Estate Planning Council of Nashville, Tennessee
- Member and Past President, Nashville Chapter of the Society of Financial Service Professionals
- President-elect, Financial Planning Association
- National Committee Person, Nashville Association of Insurance and Financial Advisors
- President-elect, Donelson-Hermitage Exchange Club
- Director of Membership Development, Donelson-Hermitage Chamber of Commerce
- Board Member, Donelson-Hermitage Chamber of Commerce
- Past President, Tennessee/Kentucky District Exchange Clubs
- Past-President Tennessee/Kentucky District Exchange Club
- Board Member, Family Center for Prevention of Child Abuse

1-877-7-ASK-IFG Ext. 121
hwootten@askifg.com
www.buddywootten.com

With more than 30 years of experience in the financial services industry, H.E. “Buddy” Wootten has dedicated his career to assisting individuals and small business owners achieve their financial goals. Today he is Vice President, Business Planning with Innovative Financial Group, LLC.

A Certified Financial Planner™ practitioner, Buddy specializes in retirement, business, and estate planning, including insurance needs, business succession planning and funding, employee benefits, nonqualified executive compensation plans, and charitable giving strategies.

Buddy understands the most difficult aspect of the planning process is implementation, and he works closely to help each client enact his or her plan and to coordinate all areas into a comprehensive approach. He also helps to implement the crucial step of

reviewing each client’s plan annually to update his or her financial strategy in response to changing needs and market fluctuations.

Buddy is a graduate of MTSU in Murfreesboro, Tenn., and earned a master’s degree in Financial Planning from the College of Financial Planning in Denver, Co. He is insurance licensed in life, health, and variable products in numerous states and is an Investment Advisor Representative with Signator Investors, Inc.

Buddy resides outside Lebanon, Tenn., on a horse farm with his wife Mary.