



KEYSTONE

Financial Group

8178 Gadsden Highway, Suite 104

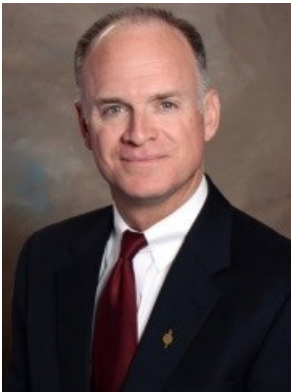
Trussville, Alabama 35173

Bus: 205-655-7526 or 800-894-0065

www.KeystoneFinGrp.com

The Keystone Resource Group

Investment advisory and financial planning services of the Keystone Financial Group are provided by David R. Guttery, RFC, RFS, CAM. Other professional services beyond the scope of Keystone Financial Group are available through a resource network of professionals. The resource network is comprised of independent professionals, each having a distinctive competency in their respective fields and firms. David routinely works with these, and other financial professionals with whom his clients may already have an established relationship. When no such relationships exist, clients are encouraged to make inquiries of multiple professionals that might provide a given service. Ultimately, that choice should be made by the client, as a function of competency, trust, and comfort.



David R. Guttery*, President/Founder

Keystone Financial Group

dguttery@keystonefingrp.com

As President and Founder of Keystone Financial Group, David's goal is to design, implement, and monitor the financial road map between today and tomorrow, each being individually tailored to the client, and focused upon the efficient achievement of their goals. David is an avid Crimson Tide fan and lives in Trussville with his wife Teresa. David has one son, Brandon who is currently completing his Bachelor of Science degree in finance at the University of Alabama.



Meredith White, Director of Marketing & Manager of Client Services

Keystone Financial Group

mwhite@keystonefingrp.com

Meredith helps to keep our clients well informed and educated about our current news and processes. She is well versed in the financial industry due to experience from a previous broker-dealer and has an extensive professional background in marketing. Meredith is the wife of Birmingham-Southern College, Head Football Coach, Tony Joe White. They live in Trussville with their two children, Emily and Tucker.



Kelley Daniels, CPA

Stone, Avant, Daniels-Certified Public Accountants & Business Consultants

www.stoneavant.com Tel: 205-870-9898

Kelley is a native of Calhoun County, Alabama and a graduate of Jacksonville State University and the University of Alabama at Birmingham. She has practiced as a CPA for over 30 years assisting small businesses and individuals with accounting and tax needs. Outside the office, Kelley spends her time with her family traveling and supporting her two sons in their sporting events.



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Gary McCullough, Loan Officer

Method Mortgage

www.methodmortgage.com Tel: 205-705-1650

Gary has over 15 years of mortgage experience and is committed to providing a high level of service throughout the entire mortgage process. He is a lifelong Birmingham, Alabama resident who enjoys the outdoors and spending time with his family.



Bill Stuman, Owner/Agent

Deerfoot Insurance Agency

www.deerfootins.com Tel: 205-655-1020

Deerfoot Insurance Agency is an independent agency with the ability to utilize different providers to meet their customer's unique insurance needs. They have served families, individuals and businesses in central Alabama since 2001. Owner Bill Stuman lives in Springville with his wife, Meleigha and son Grant.



Business and Estate Planning legal service referrals available. Due to regulations of the Alabama Bar Association, we are not permitted to print our resource contact information. If you are in need of legal counsel, names and contact details are available upon request.

**David R. Guttery is a Registered Representative and Investment Advisor Representative offering securities and investment advisory services solely through Ameritas Investment Corp. (AIC). Member FINRA/SIPC, a registered broker/dealer and registered investment advisor. AIC and Keystone Financial Group are not affiliated. Additional products and services may be available through David R. Guttery or Keystone Financial Group that are not offered through AIC. Representatives of AIC do not provide tax or legal advice. Please consult your tax advisor or attorney regarding your circumstances. Information regarding professional services are for the convenience of the client or user, and are not endorsed by Ameritas Investment Corp.*