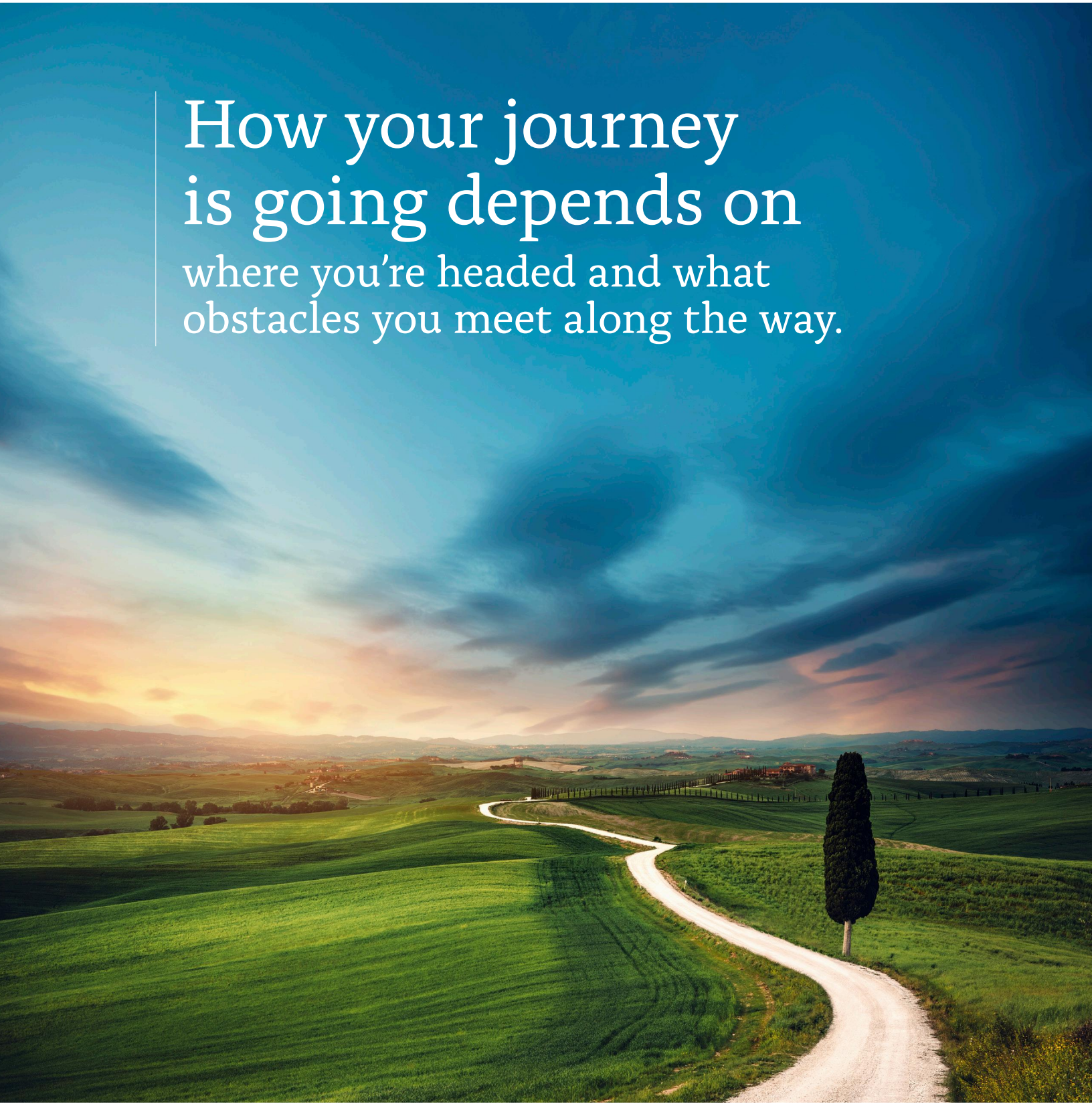
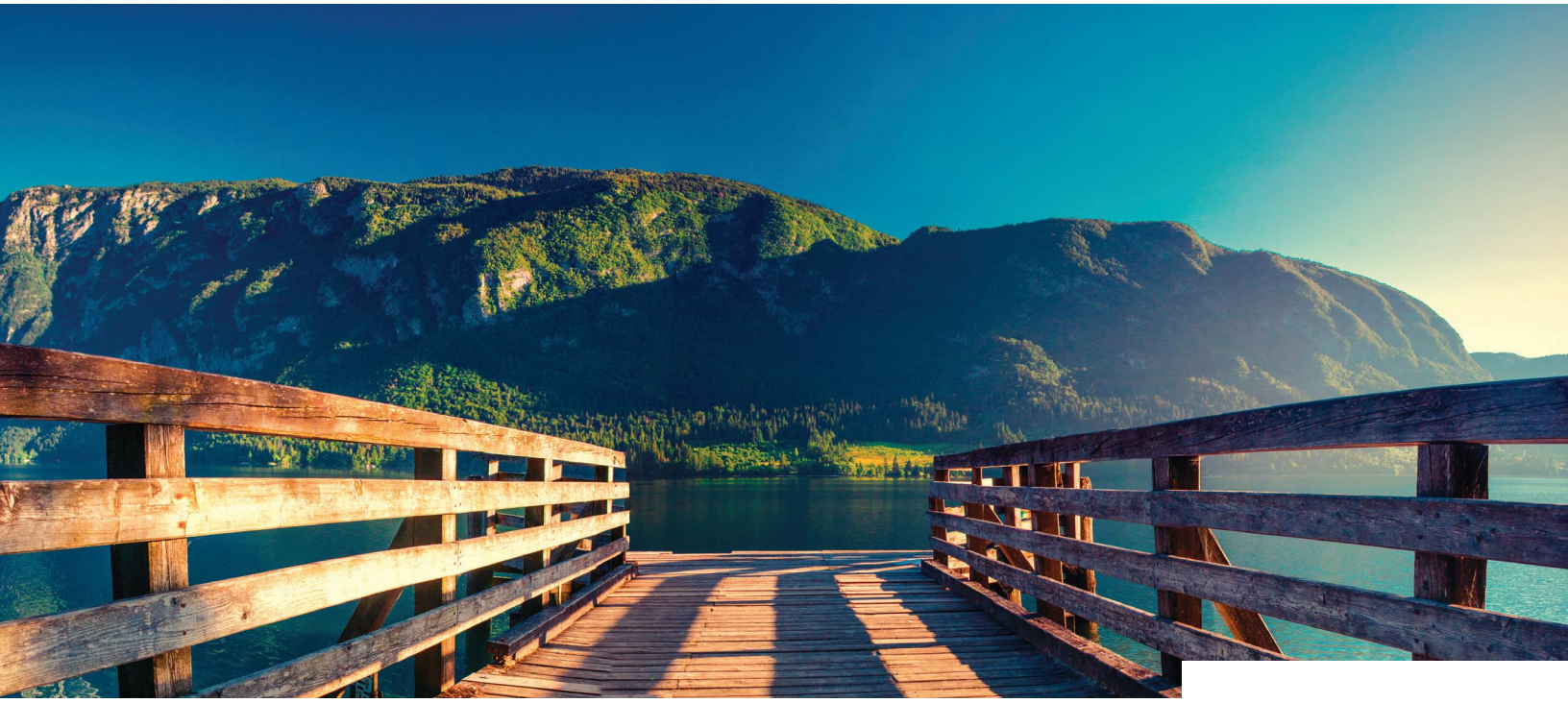
Eagle Strategies LLC

THE NAUTILUS GROUP®

How your journey is going depends on

where you're headed and what obstacles you meet along the way.





- A key element for a successful journey in achieving your financial independence goals is making informed decisions.
- Access to accurate, well researched information in the complex financial arena is essential for developing clarity and confidence as you secure your family's financial future.
- Selecting a qualified, knowledgeable professional ally you can trust to bring resources and services to the planning table is critical to successfully accomplishing your objectives.





- We are just such an ally. We specialize in helping you build sustainable strategies to optimize your financial resources.
- This includes developing a plan which provides successful asset accumulation, asset protection, estate transfer and business succession, as well as properly considering philanthropic interests.
- Working with a trusted ally can take you a long way. And make the journey even more rewarding.







It is one thing to offer advice. It is another to offer tangible solutions.

Understanding what's important to you is essential. And our relationship with you begins right there. We have learned that typically, most people have gaps between where they are and where they want to be in their planning. Through our process, designed to collaborate with all of your professional advisors, we identify goals and analyze potential gaps, and build a plan to close those gaps.

This process is possible through my dual affiliation with **The Nautilus Group®**, an elite circle of financial professionals, and **Eagle Strategies LLC**, a Registered Investment Adviser. Each offers distinct benefits and services, and together they enhance my firm's ability to provide the full spectrum of personalized, professionally managed financial resources.







Eagle Strategies LLC

We give you access to some of the most respected and experienced investment managers in the industry through my affiliation with Eagle Strategies. The Eagle team of more than 70 credentialed professionals utilizes a sophisticated wealth management platform to create customized investment and planning solutions that are designed to build and preserve your wealth.

Through Eagle Strategies' investment advisory and financial planning capabilities, your wealth journey benefits from a proven process designed to work for you every step of the way.



The Nautilus Group®

My affiliation with The Nautilus Group®, an exclusive, nationwide resource reserved for our high net worth and business owner clients, enables us to fully grasp your entire financial picture, including key areas such as family protection, estate and legacy planning, charitable giving, executive benefits, business succession and exit planning.

I work hand in hand with you, your other advisors, and the Nautilus strategists—professionals experienced in estate and business law, taxation, insurance, finance, accounting, and philanthropy—to provide a wide range of consultative services and technical case design. It's a relationship dedicated to smart thinking, sound recommendations, and true financial expertise in virtually every area that affects your wealth.



Where there's a journey worth taking, there's a road map worth bringing along.

Rarely does a wealth advisor offer a full breadth of services across the entire wealth continuum, everything from investment advisory support to sophisticated financial, business, and estate planning. But then rarely do individuals attain the level of wealth that demands both sophisticated knowledge and multiple solutions.

Clearly you have arrived at a point in your journey where the value of a trusted financial companion comes into focus. We look forward to being with you for that journey to the horizon that lies ahead.



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Joel Field, CFP®, CLU®, LUTCF®

Field Financial Strategies, LLC

Joel founded Field Financial Strategies, LLC, a boutique financial practice, out of an overarching desire to help empower clients to confidently pursue their goals without worry about finances. He advises highly successful professionals, business owners, and physicians around the country on the unique opportunities and challenges created by their success. He specializes in comprehensive financial planning in the areas of retirement and investment planning, estate planning, insurance planning, and business continuity planning. Joel earned a bachelor's degree in business administration from the University of Louisville in 2004 and a master's of divinity from Cincinnati Christian University in 2007.

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