



# Financial Advisors



**Michael S. Schankerman, CFP<sup>®</sup>, ChFC<sup>®</sup>, CFS<sup>®</sup>, CASL<sup>®</sup>, RICP<sup>®</sup>**  
Certified Financial Planner™ Professional  
Investment Advisor Representative  
One to One Financial Advisors  
3610 River Crossing Pkwy, Suite 280, Indianapolis, IN 46240  
317-818-4673 | 1-800-667-5792  
317-817-9934 (Fax)  
MSchankerman@OnetoOneFA.com  
www.OnetoOneFA.com

## BUSINESS PHILOSOPHY

**Plan to Succeed.** My goal is to understand what is important to every one of my clients and to provide them with a roadmap to obtain financial freedom. Whether working with corporate, nonprofit, healthcare or individual clients, my goal is to provide objective, sound financial guidance based on each client's goals, objectives and personal needs.

## PRODUCTS AND SERVICES

- 401(k), 401(a), 457 plan design and implementation
- 403(b) Plans
- Advisory based wealth management platforms
- Annuities
- Corporate based Retirement and Financial Education
- Charitable Giving Strategies
- Defined Plan Creation and Conversion
- Disability Income Insurance
- Estate Conservation Strategies
- Education Funding Strategies
- Executive Benefits
- Fee Based Financial Planning
- Group Benefits
- IRA Consolidation/Rollovers
- Life Insurance
- Long-Term Care Insurance
- Lump Sum Pension Distribution
- Pension/Retirement plan design and implementation
- Pension Payout Alternatives
- Pension Transfer/Rollovers
- Mutual Funds
- Property & Casualty Insurance

## QUALIFICATIONS

- Bachelor of Science in Business – Indiana University Kelley School of Business
- Certified Financial Planner™ Professional, CFP<sup>®</sup>
- Chartered Financial Consultant, ChFC<sup>®</sup>
- Certified Fund Specialist, CFS<sup>®</sup>
- Chartered Advisor for Senior Living™, CASL<sup>®</sup>
- Retirement Income Certified Professional, RICP<sup>®</sup>
- Series 6, 63, 7, 66 securities licenses
- Investment Advisor Representative
- Member of Million Dollar Roundtable

## PERSONAL

- 29 year resident of Carmel, Indiana
- Married to wife, Karen, since 1985
- 3 children: Andrew, Max & Rebecca
- Hobbies: Walking, Geography, Reading and Spending time with family

## ORGANIZATIONS

- Member of Financial Planning Association

Michael S. Schankerman is a registered representative of and offers securities, investment advisory services & financial planning services through MML Investors Services, LLC, Member SIPC ([www.SIPC.org](http://www.SIPC.org)). Supervisory office 900 East 96th Street, Suite 300 Indianapolis, IN 46240 Phone (317)469-9999. One to One Advisors is not a subsidiary or affiliate of MML Investors Services, LLC or its affiliated companies.