**Professional Disclosure Statement**  
**Jay C. Wade**

Qualification/Experience: I am pleased that you are considering me as your financial coach. This document is to provide you with information regarding my background and increase your understanding of our professional relationship.

* Graduate of University of Florida “Master Money Mentors” program.
* Graduate of Dave Ramsey’s Financial Coach Master Series.
* 17 years with Primerica Financial Services teaching families how money works and providing options that may help change their financial future.
* Licenses previously held include: Property & Casualty; Mortgage Broker; Life Insurance; Security Licenses (Series 6 & 63); registered with the Security Exchange Commission (SEC) and National Association of Security Dealers (NASD).
* Entrepreneurial Certified Field Trainer with a Fortune 500 Financial Company.
* Leader and Team Coordinator of Financial Peace University; Legacy Journey; Church wide Momentum Series and Jr. Adventures Bible Study.
* Instrumental in organizing and successfully graduating over 500 families in Financial Peace University; 360 families in the church wide Momentum series; and 12 families in the Legacy Journey Series.
* Retired with 15 years of service at a major insurance company settling Bodily Injury claims with families and or their attorneys.
* Recognized and received the 2012 Outstanding Coordinator Award from Dave Ramsey Solutions.

Nature of Coaching: Coaching is not looking back. Coaching is starting from this point and working forward to a life of freedom from debt. As a coach, I have the obligation to help people find ways to lead them to financial freedom, and together, if they work the financial changes suggested and agreed upon, they will become debt free and able to start building wealth. The use of biblical scriptures dealing with financial issues will be the underlying basics of our work together along with prayer at all times. “The rich rule over the poor, and the borrower is slave to the lender.” (Proverbs 22:7)