

BUSINESS BIO: DAVID BAUMANN



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Sutton native David Baumann is a financial advisor with Renaissance Financial Corp. in Omaha. Here, he shares a little more about his position and company. For more information, Baumann may be reached at 402-682-3913 or david.baumann@rfconline.com.

Please share with us a little about Renaissance Financial Corp., including what services you provide.

Renaissance is a Midwest-based firm with offices in Lincoln, Omaha, Kansas City and St Louis. We are a full-service, independently owned-and-operated firm that consists of about 270 employees. We work with business owners and individuals in regard to 401k, pension offerings, health insurance, investment, insurance and retirement strategies. Every financial strategy is unique in design, as every client's needs are unique in design. In any of the financial strategies that we assist people with, we help clients understand the tax consequences of what they are incorporating into their long-term financial picture

What is your role with the company?

My role is as a financial advisor.

Is your educational background in finance?

My college education was in business administration, which included a fair amount of finance classes.

What made you decide to become a financial advisor, and what steps did you have to take?

I have always had an interest in the financial markets. I viewed joining Renaissance Financial as an opportunity to engage my interest in the markets and couple that with having an interest in helping people I care about with their financial strategies. I am licensed to represent health and life products, as well as having my Series 6, 63, 65 and 7 securities registrations.

How long have you been a financial advisor, and how long have you worked at Renaissance Financial Corporation in Omaha?

I joined Renaissance Financial in early 2006 when we opened our Omaha office.

What territory or area do you serve?

One of the things I appreciate about Renaissance is that we do not operate in a territory. We understand that comprehensive financial services are about utilizing relationships of those that you care about and see how we can be of assistance. I am currently licensed and do business in seven different states.

What do you enjoy most about your position?

Every day is a new opportunity. Every client has different goals for their financial future. The most rewarding part is formulating a financial strategy and having them understand the game plan to help them reach their goals.

What is the most challenging aspect of your position?

The most challenging aspect is those people that put planning off and don't do enough today to put them in a better situation for tomorrow.

What is the most rewarding aspect of your position/business?

The most rewarding aspect of what I do is when I receive a referral call from someone I don't know that says, "I was told to call you, because you helped one of my friends, and I think I want to know more about what you do."

What differentiates Renaissance Financial Company from other financial groups?

I think our biggest differentiating factor is our approach and style in dealing with people. I feel there are a lot of options to financial services. It is the way you feel after conversations and financial programs are put into place, as well as the communication, that really makes the difference.

What is the most important thing people should know about financial services?

As simple as it sounds, don't put all your eggs in one basket. Your financial program should be tailored to manage risk by being diversified according to time lines and risk/return metrics, as well as offering tax sensitivity. As your life happens (and it will), or as tax changes happen (and they will), hopefully your program is diverse enough to allow you flexibility.

Securities and investment advisory services are offered through Securian Financial Services, member FINRA/SIPC. Renaissance Financial Corporation is independently owned and operated.