The Shobe Financial Group®

(225) 763-7010 Get In Touch

About Services Processes Team Resources Client Center

Ready to Plan Your Financial Future?

From your life plans to your legacy, The Shobe Financial Group is the partner to trust with your financial goals.

Get In Touch

Plan your future

Providing actionable financial guidance and support for any stage of life. Most life goals require a financial plan and action strategy to pursue them. Let us help you!

VIEW OUR SERVICES

Benefit from our process

Creating and maintaining an evergreen plan to help you pursue your financial goals. Using proprietary tools and processes developed over 38+ years in business, let us build a plan for you.

VIEW OUR PROCESSES

Meet our team

Pursuing your goals with the Shobe Financial team means putting over 150 years of collective experience to work for you, including 7 Certified Financial Planner™ professionals.

VIEW TEAM MEMBERS

OUR SERVICES

Helping People Pursue Life Goals Since 1983

OUR SERVICES

Helping People Pursue Life Goals Since 1983

Sometimes life plans look a lot like financial plans. You want to start a business. Educate your children. Make smart investments. Pursue philanthropy. Leave a legacy. The Shobe Financial Group customizes its service to meet your needs.

Comprehensive planning

Think of comprehensive planning as "all-in-one" service - a constant resource. We work with you to build a plan to pursue your goals, then proactively guide you through the steps.

LEARN MORE

Retirement planning

Our team of trusted advisors can help you build your resources while you are working, and use resources effectively when you are retired.

LEARN MORE

Investment planning

As an independent registered investment advisory firm, we build suitable portfolios to help you pursue your short-and-long-term goals.

LEARN MORE

Business planning

Whether your goal is to build your business, maintain your business, or groom your business for sale, we provide planning and guidance on the path to pursue it.

LEARN MORE

THE SHOBE TEAM

Your Coaching and Accountability Team

Put our team to work for you! Our team, including 8 Certified Financial Planner™ practitioners and seasoned administrative professionals, is ready to develop and proactively manage the financial plan to your future.

View Our Team

KNOWLEDGE BASE

Check out our searchable repository of educational articles, videos and newsletters.

Knowledge Base

FOLLOW US ON FACEBOOK

Grow with us

April 04

The Shobe Financial Group's cover photo

VIEW FACEBOOK POST →

March 27

We are so excited to be joining teams with Carson Wealth!

VIEW FACEBOOK POST →

March 07

Check out our new edition of Shobe Insights to learn more on the importance of succession planning at all stages. . . . Read more: https://conta.cc/3lWUcD5

VIEW FACEBOOK POST →

Get In Touch

Simply call or complete the form to schedule a meeting so we can get to know each other.

Name *

Name

Email *

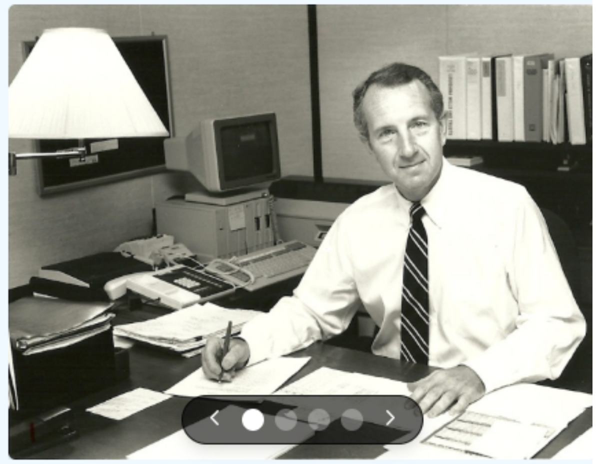
Email

Our history is defined by the way we serve clients:

With a proactive approach to helping clients pursue financial goals - almost four decades in the making.

Your finances impact all aspects of your life. It's our belief that a financial plan that's guided by your hopes, dreams and ambitions is better than the other way around. That focus has been characteristic of The Shobe Financial Group since our founder, Edward Shobe, started the company in 1983.

Long-term, high-trust relationships are the result of our focus on your best interest. As our client, you represent the cornerstone of our business. We are a resource through each transition in your life.



About Shobe Financial

In 1983, Edward Shobe set out to create a business to help people pursue their life goals through high-trust, long-term relationships. He wanted to build team of committed financial professionals who share these goal of helping people pursue their life goals. From this vision The Shobe Financial Group was born.

"Our founding principles were built on taking care of people - from clients to our team- it's the foundation of what we do," says Ed Shobe.

Jason Windham and Susan Shobe-Windham, Ed's son-in-law and daughter, joined in 1998. The following year the business moved into its current headquarters in One Oak Square.

2007 marked a significant year as Jason started his tenure as president, while Ed became chairman. Together, Ed and Jason have continued to

OUR DIFFERENCES PROVIDE VALUE TO YOU

Your Team

More than just an individual advisor, our financial planning process connects you to an entire team of professionals whose experience is put to work toward your goals.

Seasoned and Experienced

Our team boasts over 150 years of experience, and many industry-specific credentials – which means we have the knowledge and real-world experience to help you pursue your goals.

An evergreen plan for your changing needs

Your plan – tailor built for you – is evergreen. We regularly review your goals, while Ed became chairman. Together, Ed and Jason have continued to advance the original goals by:

- Developing and enhancing proprietary tools and processes to deliver consistent personalized services to every client through long-term, high-trust relationships.
- Solidifying a career path, including an official internship program for finance students, to continue to mentor professionals and build our team to best serve our clients.

Building each other up as a team and supporting every client's best interests as if they were our own is a part of our culture. It's been this way since 1983 and will continue for years to come.

Your plan – tailor built for you – is evergreen. We regularly review your goals, needs, and plan to keep it current and actionable.

Active Planning - Proactive Guidance

Beyond building your plan, we provide proactive guidance to help you push for the results. Sometimes that means focus on the areas you can improve and provide assistance, discussion and exploration through each transition in your life to stay on path.

Here for You

We are a resource to call to war-game or to get advice on the financial topics that impact your life.

Get In Touch

Simply call or complete the form to schedule a meeting so we can get to know each other.

(225) 763-7010

(225) 763-7040

info@shobe.com

8280 YMCA Plaza Drive
Building 4
Baton Rouge, LA 70810

Name *

Name

Email *

Email

Phone Number *

- ### -

Message

Message

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Your Goals - A Custom Plan

Financial Planning for Every Chapter of Your Life

You can pursue the goals you know today - and those you will decide on along your life path - with a guide to lead you. No two families are the same, and throughout life stages, your needs will change. The Shobe Financial Group customizes its service to meet your needs.

SERVICES CUSTOMIZED TO YOUR NEEDS

Planning and Guidance

Everyone takes a different path through life. That's why our financial plans and services are customized to any life stage you encounter. The personalization of every plan is what separates The Shobe Financial Group from other financial planning firms.

Experienced, comprehensive, and credible, we provide a path for you to pursue your goals.

Comprehensive Planning | Retirement Planning | Investment Planning | Business Planning

Comprehensive Planning

Clear, Complete Planning for Your Financial Future

With Comprehensive Planning, we are a constant resource. We wrap our arms around every aspect of your financial life to develop, implement and maintain a cohesive plan to help you pursue your goals. The Shobe Financial Group provides the roadmap and resources to meet your wealth management and financial planning needs, and proactively guides you through the process.

Planning Your Future

Guidance Tailored for Your Life and Goals

Since 1983, The Shobe Financial Group has been helping people manage their financial life so they can focus on the things most important to them – their family, their business, their future.

Your life and your goals are unlike anyone else, so your plan with us is completely custom. Using our proprietary tools, we establish, maintain, and adapt your plan over time to keep up with your unique and changing goals.

Simple, Straightforward Guidance

Planning a financial future is complicated. The Shobe Financial Group works with you to simplify and clarify your financial path. Our team has the skills and experience to manage every financial matter that touches your life.

A Partnership for Your Benefit

With transparency and honesty, we strive to identify all strengths and weaknesses in your current situation and recommend strategies, procedures, and products to enhance your position. You will also enjoy our state-of-the-art software and total access to our professionals.

Personal, Proactive Financial Planning for a Lifetime

The Shobe Financial Group is a partnership designed to help you pursue your financial goals, plan for retirement and fulfill your lifelong dreams. For decades we've helped clients new and old go after their goals through sound and specialized financial decision-making. As your advisor and financial coach, we will guide - even push you, at times, to help you stay on the chosen course to your goals.

Comprehensive Planning | Retirement Planning | Investment Planning | Business Planning

Retirement Planning

Making the Most Out of Life Means More than Money

Your wealth is your foundation. It represents what you've built and where you're headed in the future. The Shobe Financial Group helps you build your resources while you are working, and use your resources effectively when you are retired. With our financial professionals planning your retirement, your future is in hands you can trust.

Comprehensive Planning | Retirement Planning | Investment Planning | Business Planning

Investment Planning

Get a Strategy for Wealth Well-Managed

Simple or complex, we plan and manage your investments around your short- and long-term goals. We create a path that aligns your goals and risk tolerance to optimize and preserve assets. When you trust your investing strategy to our professionals, your goals receive the careful guidance and attention they deserve.

Comprehensive Planning | Retirement Planning | Investment Planning | Business Planning

Business Planning

Strategic Support for Business Leaders

For owners of businesses and professional practices, we offer guidance in planning, decision making, and identifying the financial paths to pursue your goals. Our business consulting services will help you determine the most appropriate strategies to manage your taxes and liability exposure while helping you maximize potential. We offer advice, resources and strategies to pursue your goals.

The Shobe Financial Group®

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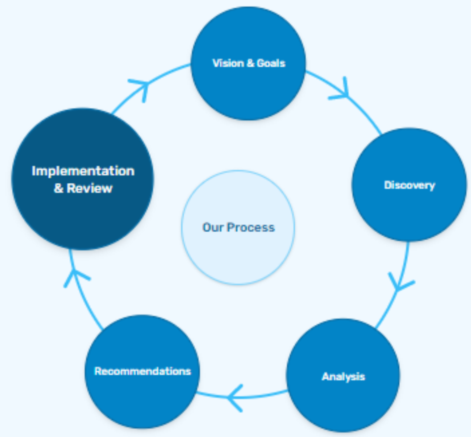
About Services Processes Team Resources Client Center

OUR FINANCIAL PLANNING PROCESS

Our Process Works for You

Every aspect of our financial planning services is designed to help you build a better financial future. At The Shobe Financial Group, we put our more than 150 years of collective experience to use in pursuit of your unique financial objectives. Our team of seven Certified Financial Planner™ practitioners along with our seasoned client service professionals help individuals and their families devise a path according to a specific, intentional set of steps. Guided by our processes, our advisors offer you an extensive menu of services that are specific to your needs.



Explore Our Process

Vision & Goals | Discovery | Analysis | Recommendations | Implementation & Review

Vision & Goals

Let's Learn About Your Goals for Your Financial Future.

Because we believe that building relationships is paramount to building a plan to your financial future, we begin by learning about you, your family, and/or your business. This means an in-depth understanding of your goals and the challenges you face.

We start this process by asking four key questions:

- What are your dreams and goals?
- How are you going to reach those objectives?
- Where are you on your journey to realizing those dreams?
- Does your current financial plan reflect your vision?

Explore Our Process

Vision & Goals | Discovery | Analysis | Recommendations | Implementation & Review

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- How are you going to reach those objectives?
- Where are you on your journey to realizing those dreams?
- Does your current financial plan reflect your vision?

Your answers help us move forward to the next step in the process.

Explore Our Process

Vision & Goals | Discovery | Analysis | Recommendations | Implementation & Review

Discovery

We'll Identify How We Can Add Value to Your Life.

Through discovery, our experienced professionals identify areas where financial planning services can help you pursue your financial ambitions. Once we understand your vision and goals, we match your goals, interests and values with our expertise and in-depth resources. In this step we dig deeper to pinpoint opportunities to pursue your financial milestones and start to develop a map to get you there.

Explore Our Process

Vision & Goals | Discovery | Analysis | Recommendations | Implementation & Review

Analysis

Form a Plan of Action.

With an understanding of your goals and your current financial circumstances, our advisors will identify areas of opportunity to pursue, and areas of weakness to plan around. With this information, recommendations are made. The tailored recommendations will include strategies, structures, procedures and products to enhance your position.

Explore Our Process

Vision & Goals | Discovery | Analysis | Recommendations | Implementation & Review

Recommendations

Identify and Take Advantage of New Opportunities

In this phase of our process, we build a tailored strategy to pursue your financial goals. The result is a financial plan complete with recommendations and a summary of actions. We will meet with you to review the full plan with you, answer questions and determine next steps.

Beyond providing recommendations, we proactively work with you to help you, track your progress and adjust your plan to meet changes or challenges. We continue to be a resource to help you navigate any changes in your life and ensure that your plan continues to reflect your needs.

Explore Our Process

Vision & Goals | Discovery | Analysis | Recommendations | Implementation & Review

Implementation & Review

Manage and Measure Progress

Once we confirmed the path, we set the plan in motion. We work together to review and revise your plan on a regular basis as your goals and circumstances change. Your plan to your goals is evergreen.

Your advisors proactively guide and assist you, providing additional resources where needed.

Additionally, we provide tools to help you.

We will create a Financial GamePlan™ that summarizes your goals and plan to guide you on the path to pursue your desired future. The professionals at The Shobe Financial Group provide you with this custom, ongoing agenda of topics, timelines, and action items — all in pursuit of your goals.

The Shobe Financial Group's Retirement Equalization Strategy™ (referenced as RESt™), for example, helps you make decisions that work for your life while on the path to your personal goals. Our advisors consider what you need to meet your retirement lifestyle goals, analyze your personal investment and savings approach and establish a long-term strategy to get you where you want to go.

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MEET THE SHOBE TEAM

Your Success is Our Priority!

Experience wealth management and financial planning with a team of professionals who care about your financial future as much as you do.

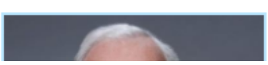
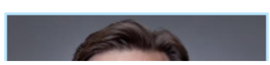
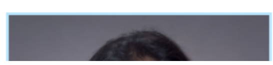
Since our start in 1983, a lot has changed about the way people earn, spend, save and manage their wealth over time.

But what hasn't changed is the role that a high-trust, long-term relationship plays in sound financial decision-making. It's a value that's just as important to us today as it was on the day we welcomed our first client in 1983.

Our team of seven Certified Financial Planner™ professionals plus seasoned client support staff are focused on your goals as if they were their own. When we better understand what your financial future means to you and your family, we achieve our goal of becoming so much more to you than a financial planner.

When it's a matter of money, it matters who manages it.

Our Team


Our Team

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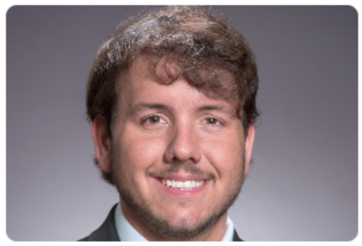
Company News

Search for

Shawna Goodly, AIF®

Congratulations, Shawna!

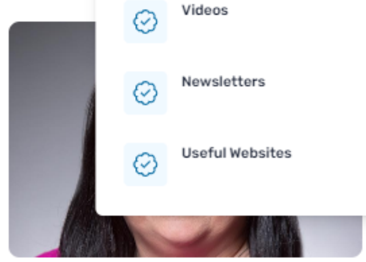
Dec 14, 2022 • 1 min read



New Employee: Noah McMichael

Welcome, Noah!

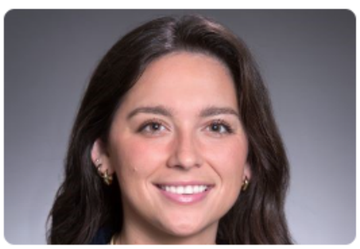
Nov 7, 2022 • 1 min read



New Employee: Robyn Valliant

Welcome, Robyn!

Sep 7, 2022 • 1 min read



New Employee: Jackie Welch

Welcome, Jackie!

Sep 7, 2022 • 1 min read

New Employee: Barrett Blanchard

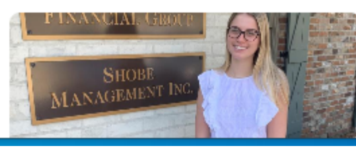
Welcome, Barrett!

Sep 2, 2022 • 1 min read

New Employee: Lauren Hanemann

Welcome, Lauren!

Jun 13, 2022 • 1 min read



Articles

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Although a million dollars may seem like a daunting figure, especially if you haven't been diligent about saving, there's good news: You don't have to...

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Emphasize company culture starting on--or even before--day 1.

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Give Wisely to Maximize Your Charitable Impact

Contribute to the causes you care about with strategies that match your intentions.

Jan 24, 2023 • 2 min read

Maintaining Income After Retirement

How your retirement savings can continue working for you.

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Setting 2023 Goals For Your Business

Setting 2023 goals for your business? Consider these ideas.

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Financial Resolutions for 2023

Start the new year right by reviewing and revamping your financial plan.

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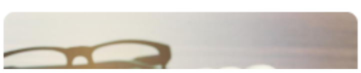

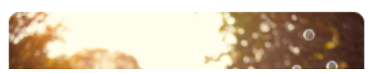

Newsletters

Stay up to date on news and financial information with our monthly newsletter!

March 2023 Newsletter

Succession Planning

VIEW NEWSLETTER →

February 2023 Newsletter

2023 Expectations for the US Economy | Positive Outlook

VIEW NEWSLETTER →

January 2023 Newsletter

Maintaining Income After Retirement | Give Wisely to Maximize Your Charitable Impact | Yearly Financial Review | Shobe Current News

VIEW NEWSLETTER →

December 2022 Newsletter

Last Minute Holiday Gift Ideas & Favorite Holiday Cookie Recipes

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November 2022 Newsletter

Market Outlook for Q4 | Recession? | Some things to watch | What to do

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October 2022 Newsletter

Make Your Final Tax Saving Moves Before Dec. 31 | Shobe Current News | Shobe Tech Corner | Five Tips to Avoid Getting Scammed at Tax Time

VIEW NEWSLETTER →

Useful Websites

Glossary of Investment Terms

Raymond James Investment Terms

This glossary is designed to help you understand some of the more common investment and financial terminology.

Eldercare

Louisiana Physician Orders for Scope of Treatment (LaPOST)

Improving end-of -life care in Louisiana by honoring the health care wishes and goals of care of those with serious advanced illnesses.

National Association of Professional Geriatric Care Managers

A professional Geriatric Care Manager (GCM) is a health and human services specialist who helps families who are caring for older relatives. This website will give you information about NAPGMC and provide links that may be relevant to you.

Senior Health Insurance Information Program

This program was created to provide Medicare beneficiaries with the objective information they need to better understand Medicare coverage options, rights, and benefits.

Government Agencies

Internal Revenue Service

The Internal Revenue Services (IRS) is a bureau of the Department of Treasury with

The Internal Revenue Services (IRS) is a bureau of the Department of Treasury with the responsibility of collecting taxes and enforcing the Internal Revenue Code. On this site, you will find information about taxes, tax deadlines, withholding amounts, and links to forms and publications.

[Louisiana Department of Revenue]

The Louisiana Department of Revenue collects state tax revenues to fund public services and regulates the sale of certain products within the state. This site will provide information on state tax filing deadline and options, refund information, and downloadable forms.

[Social Security Administration]

The U.S. Social Security Administration delivers a variety of services to citizens nationwide. From this site, you may replace your Social Security card, apply for retirement and disability benefits, apply for Medicare and other benefits associated with the SSA

Healthcare Resources

[Long Term Care Information]

his website explains the importance of planning ahead and details personal and financial planning steps. It also includes important housing considerations and legal issues to weigh when planning for long-term care.

Retirement Resources

[AARP]

The AARP is a nonprofit, nonpartisan membership organization for people age 50 and over. The AARP Web site offers information on public policies, health and wellness, and the wide range of unique benefits and services provided for their members.

[Raymond James Retirement Microsite]

Raymond James is a diversified financial services holding company with subsidiaries engaged primarily in investment and financial planning, in addition to investment banking and asset management. Visit this site to explore a wealth of tools and resources

Educational Videos

Financial Planning for an Expanding Family

Erin Sibley | Transcript

Spending Retirement Savings

Craig Kliebert | Transcript

Annual Financial Plan Review

Jason Windham | Transcript

Qualified Charitable Distributions (QCDs)

Bailey McNamara

Preparing to Complete the FAFSA

Jason Windham

Transitioning Finances During Divorce

Craig Kliebert

Market Volatility

Corey Luckett

Secure Act

Bailey McNamara

Retirement Income

Erin Sigur Sibley

clientaccess.rjf.com

RAYMOND JAMES | Client Access

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LOGIN

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Forgot Username? | Login Help

Enroll In Client Access

What is Client Access?

Discover the ease and convenience of having online access to your Raymond James accounts. View the interactive demo to learn more about the features and benefits and how to navigate the system.

Interactive Demo

Contact Us / FAQ

Privacy / Security

Client Resources