

Bob Markle CLF[®], CLTC

Senior Financial Representative
Principal Securities Registered Representative
Financial Advisor



I am dedicated to putting over 30 years of experience to work for you.

Your goals — my focus. Let's put strategies to work for you. Whether your priority is personal finances, your business, or both, I'm committed to helping you work towards your financial goals.

Let's connect to get started:

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EXPERIENCE:

Originally from Central Pennsylvania, I began my career in financial services in 1991 with Lutheran Brotherhood now known as Thrivent Financial. Over the years, my practice grew from one office serving 200 clients to four offices throughout Central Pennsylvania, serving over 2,000 clients. In 2006, I accepted the position of Partner for Thrivent in Dallas, TX and retired in late 2014. In 2015, I elected to join Principal as a Managing Director and assumed the same role in late 2016 for Oklahoma & Arkansas.

After six years in this position, I opted to fully focus on my individual financial services practice and retired as Managing Director in July of 2022. Our practice currently serves over 1500 clients in 11 states. I help my clients work towards achieving their financial goals through a comprehensive, customized financial strategy, based on everyone's life and needs.

EDUCATION & CREDENTIALS

Bachelor of Arts in Business Management – Penn State

FINRA Securities registrations 6, 7, 24, 53, 63 and 65

Chartered Leadership Fellow[®] and Certified in Long Term Care

Member of MDRT[®], NAIFA, GAMA, and the GAMA Foundation

MDRT Top of the Table Qualifier

INTERESTS:

In my free time, I enjoy volunteering, traveling, golf and reading. My wife and I live in Guthrie, Oklahoma and have seven children, six grandchildren and two Golden Retrievers (Sam and Mia).

Million Dollar Round Table (MDRT) annual membership demonstrates qualifying production and meeting minimum production levels and payment of annual dues. Qualification should not be perceived as a recommendation or an endorsement of services. <https://www.mdrt.org/join/member-requirements/>

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