

CONGRATULATIONS!
NAIFA-Indiana
2022 Jack Peckinpaugh Associate of the Year



C. David Welsheimer
Buckeye Planning Concepts
Anderson, IN

C. David Welsheimer, CLU, ChFC of Buckeye Planning Concepts, has a long tradition of helping clients build and preserve wealth. His focus is on estate and retirement planning for individuals and business owners.

David speaks of his work with enthusiasm: "I am dedicated to enhancing the lives of the people we serve by listening to each prospective client's goals and dreams, asking thought-provoking questions, gathering factual data, presenting creative solutions to their problems and then prioritizing the solutions and implementing them."

Outstanding service and a commitment to excellence have built a solid client base for David, largely through referrals.

A graduate of The Ohio State University, David is a firm believer in the value of ongoing career-related education for the benefit of his clients. Accordingly, he holds professional designations of Chartered Life Underwriter (CLU) and Chartered Financial Consultant (ChFC). David is a Certified Family Business Specialist (CFBS) from The American College. He is a 43-year member of the prestigious Million Dollar Round Table and received the coveted Burns Award in 1992 (Dayton Ohio).

David is a member of the Society of Financial Service Professionals (SFSP), the National Association of Insurance and Financial Advisors (NAIFA). He has conducted seminars on such topics as retirement and estate planning, providing his clients with a retirement income projection.

David is active in his community and church as a member of the Anderson Rotary Club, and the Park Place Church of God. For relaxation David and Phyllis enjoy golfing, horseback riding, walking, and biking. They reside in Anderson, IN.