

Joe Overfield Achieves Prestigious Top of the Table MDRT Qualification

GAHANNA, Ohio - June 13, 2023 - [PRLog](#) -- Joe Overfield of local Intelliplan Financial in Gahanna, Ohio has qualified for Top of the Table, a coveted milestone achievement for their membership in the MDRT. Joe Overfield's membership equips them with tools and resources to better serve their local community.

Top of the Table is an internationally recognized mark of excellence reserved for the most successful in the financial services industry. This places Overfield among the top professionals in the intensely competitive global life insurance and financial services industries.

As an investment advisor representative, Joe Overfield provides financial planning and investment advice through Prosperity Capital Advisor, an SEC registered investment adviser. Overfield is also a Certified Financial Fiduciary® which is a professional designation provided by the National Association of Certified Financial Fiduciaries (NACFF). Since 2008, Overfield has helped his clients grow and preserve their wealth by helping them take control and reach their retirement income goals. The Bucket Plan® Philosophy is an important approach Overfield implements to help his clients mitigate the financial risks and challenges of today when it comes to retirement income planning.

"Top of the Table is comprised of the best and brightest professionals our industry has to offer," said Randy Scritchfield, CFP®, LUTCF, MDRT President. "MDRT hopes to continue to foster a culture of excellence and encourage members to grow both personally and professionally."

Since 1927, MDRT has been committed to providing its members with a unique mix of networking and resources to help them gain new and unique insights to better serve clients' individual needs. Working with an MDRT member connects clients not only to a highly credible and leading financial advisor but also to an unmatched global network spanning 69 nations and territories around the world.

For more information, contact Joe Overfield at 614-255-7547 or info@intelliplanfinancial.com.

About MDRT

Founded in 1927, MDRT, The Premier Association of Financial Professionals®, is a global, independent of the world's leading life insurance and financial services professionals from more than 500 companies in 72 nations and territories. MDRT members demonstrate exceptional professional knowledge, strict ethical conduct, and outstanding client service. MDRT membership is recognized internationally as the standard of excellence in the life insurance and financial services business. For more information, please visit www.mdrt.org and follow them on Twitter @MDRTtweet

Financial planning and investment advisory services offered through Prosperity Capital Advisors (PCA) an SEC registered investment advisor. For more information, please visit www.adviserinfo.sec.gov.

Contact

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Source Intelliplan Financial
City/Town

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Country **Ohio**
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