



Planning for Your Wealth

Ed Shobe Enters a New Era



On February 1, 1983—43 years ago—Ed founded this business with a clear mission: to provide tailored financial planning and investment management services, and to create an environment where aspiring financial planners could develop. That vision has guided us ever since.

With the belief that great advice starts with genuine relationships, the firm grew doing what is right for our clients and investing deeply in our people.

With an outstanding team and strong resources now in place, Ed is stepping away from the day-to-day business to pursue new adventures. He doesn't want any fanfare around this transition—and he would certainly prefer that we don't call it "retirement." Instead, you'll find him on the golf course, or enjoying time with Danni, his wife of more than 60 years.

We are grateful for the foundation Ed built, the culture he shaped, and the legacy he leaves behind. Please join us in congratulating Ed as he steps into this next era! Ed says "don't be a stranger"!

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Behind The Scenes Resources

Meet Our Operations Team: At Carson Wealth - The Shobe Financial Group, your Advisor is supported by a dedicated team of behind-the-scenes professionals who help ensure every detail is handled with precision, care, and in alignment with The Shobe Way — punctuality, courtesy, integrity, and going above and beyond.

We're excited to introduce the key members of our operations team who work diligently to keep your experience seamless and centered on your financial goals.



Dane Babin – Director, Shobe Operations

Dane supervises the firm's operational systems and oversees process improvements to help guarantee your Advisor has everything needed to provide exceptional service.



Jessica A. Petrilak – Relationship and Operations Manager

Jessica has been with us for over 10 years and her main responsibility is to ensure all the proper procedures are followed to handle every client transaction working with our internal teams as well as our partner organizations.

Continued 

Fidelity's Tax Form Timing

Tax time again! Please note the dates that standard tax forms will be available online. Additionally, you can also log in to view your personalized tax form schedule.

Form name	Available online	Sent by mail
1099-Q	January 16	January 21
1099-R	January 16	January 21
5498 (Crypto)	January 31	January 31
1099 (Group 1)	January 24	January 29
1099-DA	February 17	February 17
1099 (Group 2)	February 7	February 12
1099 (Group 3)	February 21	February 26
1099 (Group 4)	March 11	March 16
5498, 5498-SA	May 15	May 20

Behind The Scenes Resources - continued



Gwen Riley – Client Experience Advocate

Gwen is often your first point of contact. She manages scheduling, coordinates communications, and ensures you're welcomed and supported from the moment you arrive in our office.



Meg Gifford – Operation Support Specialist

Meg handles many client needs, her attention to detail helps make certain that each step is completed correctly and promptly.

Carson Wealth – Operations Support Group

We have backup! – We have staff all over the nation who could be tasked with sending you a document to sign through DocuSign or some other method when we need extra help.

Together, this team ensures that your Advisor can focus on what matters most—you—while we handle the logistics and details behind the scenes. We are grateful for the trust you place in Carson – Shobe. We remain committed to delivering the highest level of service and care.

Our founding principles were built on taking care of people – from clients to our team – it's the foundation of what we do.

Ed Shobe, Founder
The Shobe Financial Group

Shobe Happenings

Shobe Happenings is a section of our communication where we like to share exciting news and fun facts about our team and families.



Meet Collin!

Collin Blanchard has joined our team as a Financial Service Associate. Collin joined the Shobe team as an intern in 2023 while pursuing a Bachelor of Science in Finance from Louisiana State University. During this time, he gained experience supporting advisors and assisting with various aspects of the financial planning process. Following graduation, he joined the firm on a full-time basis and works with clients to support their financial planning needs.

News with the Kliebert Kids

What's harder on a parent than a new driver in the house? How about 3 new drivers? That's right...Craig's triplet's are drivers! (Craig Kliebert is Senior Vice President and Certified Financial Planner with Carson-Shobe)



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