



Advisor.Investments

Focused on your retirement, so you can focus on life.

(/)

 (<https://www.linkedin.com/company/advisor-investments>)

 (<http://www.facebook.com/AdvisorInvestments-134175020446109/>)

 (http://www.twitter.com/advisor_invest)

 (<http://www.youtube.com/disriabr>)

Focused on Retirement

so you can focus on life



(/videos)



(/retirement)

V (/VIDEOS)IDEOS (/VIDEOS)

RETIREMENT (/EXXONMOBIL-RETIREMENT)



(/blog)



(/news)

BLOG (/BLOG)

NEWSWORTHY (/NEWS)

Specialized in Serving Oil and Gas Retirees

Advisor.investments is an SEC-registered RIA firm headquartered in Baton Rouge, Louisiana, serving affluent individuals and families who generally tend to have \$1MM in net worth or more.

[Learn more... \(/about\)](#)

Our Firm

Learn more about our amazing team of professionals and see what makes us different. We're here to help guide you in the right direction.



(/investment-manager-james-pope)

(/investment-manager-

james-pope)

(/investment-manager-james-pope)

JAMES POPE (/investment-manager-james-pope)

Investment Advisor (/investment-manager-james-pope)



(/financial-advisor-shane-haag)

(/financial-advisor-shane-

haag)

(/financial-advisor-shane-haag)

SHANE HAAG (/financial-advisor-shane-haag)

Investment Advisor (/financial-advisor-shane-haag)



(/tax-strategies-consultations-shantelle-palermo-ea)

(/tax-

strategies-consultations-shantelle-palermo-ea)

(/tax-strategies-consultations-shantelle-palermo-ea)

SHANTELL PALERMO, EA (/tax-strategies-consultations-shantelle-palermo-ea)

Tax Strategies & Consultations (/tax-strategies-consultations-shantelle-palermo-ea)



(/investment-analyst-reggie-mcfadden-cfa)

(/investment-

analyst-reggie-mcfadden-cfa)

(/investment-analyst-reggie-mcfadden-cfa)

REGGIE MCFADDEN, CFA (/investment-analyst-reggie-mcfadden-cfa)

Investment Research (/investment-analyst-reggie-mcfadden-cfa)



(/financial-advisor-kevin-vidrine)

(/financial-advisor-kevin-

vidrine)

(/financial-advisor-kevin-vidrine)

KEVIN VIDRINE (/financial-advisor-kevin-vidrine)

Investment Advisor (/financial-advisor-kevin-vidrine)

(/maggie)



(/maggie)

(/maggie)

MAGGIE HARRELL (/maggie)

Client Services (/maggie)

(/aunjelle)



(/aunjelle)

(/aunjelle)

AUNJELLE BIZETTE (/aunjelle)

Client Services (/aunjelle)

Latest Blog Posts

Should I take my pension as lump sum or monthly payment (or both)? (/blog/Should-I-take-my-pension-as-lump-sum-or-monthly-payment-or-both)

If retirement is on your mind, the big question probably goes something like this, “Should I take my pension as a lump sum or a monthly payment?” In this article we’re going to look at a hypothetical company’s pension plan benefits and help you figure out if you should pursue the pension plan or the lump sum options.

Retirement coming soon?

Retirement is on its way, there’s no denying it. So you clear off the cobwebs one day and open up...

[Read More \(/blog/Should-I-take-my-pension-as-lump-sum-or-monthly-payment-or-both\)](/blog/Should-I-take-my-pension-as-lump-sum-or-monthly-payment-or-both)

The Making of an LC Wildcat: Interview with our own Shantelle Palermo (/blog/making-lc-wildcat-interview-our-own-shantelle-palermo)

We recently found out that Shantelle Palermo (<http://www.advisor.investments/tax-strategies-consultations-shantelle-palermo-ea>), a team leader with our company, will see her son off to college this fall at Louisiana College (<https://www.lacollege.edu/>) at Pineville. He'll be playing football for the Wildcats!

We had to sit down with Shantelle to find out what the process was like getting a child into a collegiate sports program. We were...

[Read More \(/blog/making-lc-wildcat-interview-our-own-shantelle-palermo\)](/blog/making-lc-wildcat-interview-our-own-shantelle-palermo)

What You Should Know About Retiring From ExxonMobil: Retirement Planning Tips for ExxonMobil Employees (/blog/what-you-should-know-about-retiring-exxonmobil-retirement-planning-tips-exxonmobil-employees)

Most of what we do or have done here at Advisor.Investments has come through two decades of experience working with families going through the ExxonMobil retirement plan and its process. Here are some retirement planning tips for ExxonMobil employees who are wondering what you should know about retiring from ExxonMobil.

What You Should Know about Retiring from ExxonMobil

With so many investment advisors to choose from, how do you know that you'd be...

[Read More \(/blog/what-you-should-know-about-retiring-exxonmobil-retirement-planning-tips-exxonmobil-employees\)](/blog/what-you-should-know-about-retiring-exxonmobil-retirement-planning-tips-exxonmobil-employees)

11939 Bricksome Ave
Baton Rouge, LA 70816
225 292-0687 (tel:225 292-0687)

405 West Main Street, Suite 107
Lafayette, LA 70501
337 704-5450 (tel:3377045450)

☎ Toll Free: 1-866-748-0687 (tel:1-866-748-0687) ☎ Fax: 225 292-0006 (225 292-0006)

✉ Service@advisor.investments (mailto:Service@advisor.investments)

 (<https://www.linkedin.com/company/advisor-investments>)

 (<http://www.facebook.com/AdvisorInvestments-134175020446109/>)

 (http://www.twitter.com/advisor_invest)

 (<http://www.youtube.com/disriabr>)

Please review Important Disclosure Information set forth in this web site. Advisor.Investments is DBA (Doing Business As) name for Diversified Investment Strategies, LLC an SEC-registered investment adviser. Insurance services through Advisor.Investments. This website provides general information, and is not intended to offer investment, insurance, or financial planning advice. The purpose of this site is to provide you with information about the firm, our services, our investment philosophy, and to provide a means for you to contact us for further information. Please click for terms of use. (/Important-Disclosure-Information)

Our associates are NOT affiliated, recommended, nor endorsed by ExxonMobil or any other company. Any documents and materials presented herein have NOT been reviewed or approved by ExxonMobil or any other company and may not be accurate representations of documents and materials published by ExxonMobil or any other company.

Licensed in Alabama, Florida, Louisiana, Mississippi, Nebraska, Texas.

Insurance contract obligations are subject to the claims paying ability of the insurance company. Annuities are not FDIC or NCUA insured, not bank guaranteed, may lose value and are not a deposit. Products and features are subject to state availability. Limitations and exclusions may apply.

[Privacy Policy \(/privacy-policy\)](#)

© 2019 ADVISOR.INVESTMENTS. All rights reserved.

([https://www.advisorwebsites.com?
utm_source=ind&utm_medium=website&utm_campaign=poweredbyaw](https://www.advisorwebsites.com?utm_source=ind&utm_medium=website&utm_campaign=poweredbyaw))