

As Seen In

Bloomberg Businessweek, Fortune & Money

» KENTUCKY FINANCIAL



Donald Bentley, IAR, LUTCF®,
PPAC®, MDRT®, CRPC®, CTS®, and
Kevin Metzler, founder and CEO

SUCCESS Built on a Foundation of CARING

A financial advisory firm where heart means more than profit? Yes: It's a faith-based promise retirees can count on.

Launched to exclusively serve the financial planning needs of preretirees and retirees, Family Wealth Group continues to grow at a far faster speed than Founder and CEO Kevin Metzler expected.

“Our clients quickly understand that we deeply care about them and their lives, and that breeds trust as well as referrals,” Metzler reveals. “We listen more and talk less. For me and the carefully chosen advisors who have joined the firm, listening is an active process. It’s our path to discovering, effectively and proficiently, what help our clients need from us.

“We first establish the structure and then move forward to holistic, totally customized planning with an integrated approach. Bringing order to any chaos we find in our client’s financial picture is our hallmark.”

Preservation is Priority

Once retirement is elected, the whole paradigm needs to shift from a focus on growth to one of preservation. The key is expanding assets to keep up with inflation while reducing risk and lowering taxes, according to Metzler, who left the corporate finance arena to serve only the retirement community. His firm also has developed subspecialties that address the unique requirements of people from various walks of life.

“When you were young, you may have had a family doctor take care of all of your needs, but as you aged, you saw the need for specialists,” says Metzler. “It’s the same with your finances. Retirees

need a financial specialist whose goal is to keep them safe and secure, and that is the niche we are filling at Family Wealth Group. Stories of clients whose assets we have been able to rescue and preserve abound here.”

The firm claims no magical or proprietary formulas, just good, sound principles of money management and recommendations for best-of-breed investments that support what should be a joyous point in the circle of life.

“We are impartial regarding a client’s net worth. We treat everyone whom God sends our way with dignity and respect,” emphasizes Metzler. “That’s what has built and continues to shape our success as a firm.”

Family
Wealth
GROUP

Family Wealth Group is located at 2704 Old Rosebud Road,
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859-309-0349 or visit **kentuckyretireshere.com**.