Wise Wealth, LLC

First Wisdom, Then Wealth

**Through wisdom a house is built, and by understanding it is established;
By knowledge the rooms are filled with all precious and pleasant riches.**

– Proverbs 24:3-4

Political events and natural disasters of epic proportion are coinciding as never before, with sobering implications for the global economy. It is increasingly difficult for investors to know which way to turn. Kansas City-based Wise Wealth, LLC helps high-net-worth individuals, families, and companies identify realistic goals, chart an appropriate course, and most importantly, stay on track, through good times and bad.

Long-Term Approach

"Two of the biggest mistakes investors make are basing decisions on fear or greed," says founder and CEO Stephen Stricklin, CFP®, AAMS. "You can't win if you are constantly changing your strategy based on what's happening in the moment. We focus on the long term — preserving wealth for clients and their heirs."

Values-Based Planning

Wise Wealth helps clients achieve financial peace by developing a lifetime plan that includes investment, risk management, tax mitigation, and legacy planning. The firm believes in four essential phases of a sound financial strategy: wealth accumulation, income distribution, wealth preservation, and wealth transfer. Combining biblical principles with proven financial strategies, Wise Wealth tailors portfolios according to each client's unique circumstances, goals, and risk tolerance. Though each plan is unique, Wise Wealth generally adheres to a moderate portfolio strategy, valuing stocks over bonds and smaller companies over large ones.

"We have a five-year rule," Stricklin says. "If you are within five years of needing your money, the stock market is not the place to be. We plan portfolios so that if the stock market crashes today, our clients are not going to be devastated."

"Most people are anxious about money because they don't have a plan. We're offering something that cannot be bought — which is peace of mind."

— Stephen Stricklin, CFP®, AAMS

Ethics and Customer Service

Honesty, integrity, and the Golden Rule are at the core of how Wise Wealth operates. As an independent, full-service Registered Investment Advisory firm, Wise Wealth does not represent any particular third-party company or specific financial product, and therefore acts solely in the client's best interest. The team adheres to a stringent code of ethics and is dedicated to responding to clients' needs promptly.

"We try to help people understand there is more to financial health than just simply investing," Stricklin says. "Most people are anxious about money because they don't have a plan. We're offering something that cannot be bought — which is peace of mind."

Other Valuable Services

In addition to individuals and families, Wise Wealth proudly serves many business clients. By using Wise Wealth's Workplace Money Coach Program, medium to large companies can easily save up to $2,000 a year per employee. The firm is also enthusiastic about its free-of-charge financial ministry service for churches and nonprofit organizations, as well as a Dave Ramsey Certified financial education program designed for clients' children.

Stephen Stricklin hosts The Wise Wealth Radio Show, *heard weekly on KCMO Talk Radio 710AM in Kansas City. The program is also available as a podcast at* ***www.wiseswealthkc.com***.

WISE WEALTH, LLC

FIRST WISDOM, THEN WEALTH

618 SE 4th Street | Lee's Summit, MO 64063 | 816.889.WISE (9473) | **www.wisewealthkc.com**

Financial Planning / Wealth Management / Workplace Financial Education / Financial Coaching / Financial Ministries