BILL KINKEL
GENESIS WEALTH MANAGEMENT GROUP, LLC

Independent Registered Investment Advisor

REGISTERED INVESTMENT ADVISOR

- Develop tailored solutions to meet your needs
- Experienced investment managers
- Comprehensive portfolio management
- Ongoing investment monitoring
- Separately Managed Accounts (SMA)
- Preservation of capital and income
- 401K/IRA analysis and allocation recommendations

CUSTOM FINANCIAL PLANNING

- Financial & Investment Planning
- Portfolio evaluation and stress testing
- Asset Allocation and Risk Assessment
- Retirement Income Planning
- Optimal Social Security optimization
- Medicare options

Scan the QR code to open your initial planning account today.

BUSINESS RETIREMENT PLAN SERVICES

- Exceptional Service for your current retirement plan or guidance establishing a new 401K or Simple plan
- Helping business owners select and monitor investments, navigate their fiduciary responsibilities, and reduce potential liabilities
- Commitment to superior ongoing service and participant education
- Vendor management to make sure your plan is cost effective

FAMILY SERVICES

- Planning for Marriage, Divorce & Births
- Multi-Generational Goal Tracking
- Family Financial & Healthcare Education
- Lifestyle Planning & Advice
- College funding analysis

ESTATE & INHERITANCE PLANNING

- Estate Planning / Wealth Transition
- Estate Management Education
- Philanthropy & Charitable Giving / Legacy Planning
- Family Appointments Recommended
- Elder Law Planning
- Our affiliated law firm provides estate planning solutions

HUB *of* SERVICES

Our team of experienced financial advisors and industry professionals have the structural flexibility to help clients plan their customized portfolio and financial life options for a truly comprehensive wealth management solution. We pride ourselves on simplifying complex situations, transparency, accountability, and maintaining a commitment to your success.

Bill Kinkel: Client Service Model

My commitment to you

I am dedicated to helping you achieve your investment goals by providing personal attention and quality services.

Built on integrity and trust, I provide cost-efficient portfolio construction with tailored solutions that meet your needs. A conservative approach to help you live comfortably today and protect your legacy for the future.

I stay up to speed with the latest technology, market developments, and continuing education requirements.

Process
- Understand your goals
- Gather information and evaluate your situation
- Comprehensive risk assessment
- Discuss options, create and implement your plan
- Monitor your plan

Scan the QR code to learn how I help you assess risk

How we communicate

Scheduled outreach includes regular planning reviews and check-ins.

- Quarterly reviews- (virtual meetings available)
- I am committed to open communication, guaranteeing you a personal response to every call or email within 24 hours.
- 24/7 online encrypted and secure account access
- Secure online statements and document storage

Call me directly or visit my website
www.genesiswmg.com to schedule an appointment

Education and Client Support

Your financial well-being includes more than just financial planning. We strive to educate, entertain, and help build memories.

- Invitations to educational events and webinars.
- Retirement Plan lunch and learn events hosted at one of our offices or at your place of business
- Access to our entire Hub of Services
- Schedule a guest speaker for your organization

Scan the QR code to watch my video:
Are you retirement ready?

GWM BILL KINKEL
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