

KIMERY WEALTH MANAGEMENT

Plan. Preserve. Prosper.

The fear of running out of money during retirement has some families held hostage. Even those with considerable wealth find themselves forgoing nice vacations and putting off necessary major purchases. “We want to help clients learn how to enjoy their successes and be ready to enter retirement boldly,” says Kevin D. Kimery, president and CEO of Kimery Wealth Management in Memphis, Tennessee.

Listed in the first class of Five Star Wealth Managers and every year after, Kimery founded Kimery Wealth in 2017 after nearly 25 years in the financial industry. The experience he gained while working with three of the nation's largest brokerages allows him to deliver a sophisticated level of services to clients in a smaller, more personal setting.

At the privately-owned Registered Investment Advisory (RIA), Kimery has assembled a team of professionals who share his commitment to over-the-top service. He is joined by Senior Investment Advisor Matthew C. Heffington, Financial Analyst David R. Hunter, Chief Administrative Officer Bailey M. Berry and Relationship Manager Patti H. Trippeer. Together they bring extensive expertise in family wealth advising and institutional consulting for individuals, families, groups and nonprofits.

“Our understanding of institutional investing is a big advantage for the individuals and families we work with,” says Kimery who has been honored by The American Registry, *Wealth & Finance International* and *Barron's*. “Most financial advisors have little experience in institutional investing because, until recently, those strategies have been available only to large institutions with multiple millions to manage. Smaller investors had only one option: buy, hold and hope. Now, thanks to new technology, families of much more modest means, perhaps as little as \$1 million, can benefit from institutional-style active and passive asset management.”

A Passion to Improve Lives

Kimery Wealth professionals serve Ivy-league schools, corporations, and nonprofits as well as advising families who are building wealth or preparing for retirement. “The stakes are actually higher for families and family groups. They need a trusted confidant who can offer credible reassurance as well as practical guidance on all aspects of wealth,” says Kimery.

Whether for families or institutions, Kimery Wealth's approach is to preserve and grow assets conservatively, over time. The team creates customized portfolios using alternative investing, fixed income strategies and options strategies as appropriate. Special emphasis is placed on after-tax results. Because the firm is a truly independent fiduciary, all recommendations are made solely on the best interest of the client.



“A REGISTERED INDEPENDENT ADVISOR, KIMERY WEALTH SERVES AS A FIDUCIARY, A LEGAL STANDARD OF THE HIGHEST STANDARD OF CARE WHEN IT COMES TO ADVISING CLIENTS.”

Life Coach for Your Money

The time and effort to provide this level of service requires Kimery Wealth to be selective when accepting clients. “We only do business with people we know well and then make them a priority,” explains Kimery.

The close relationships Kimery Wealth builds with clients allow the staff the luxury of discussing more than dollars and cents. They address behaviors standing in the way of reaching goals, such as fear-induced paralysis caused by volatility in the market or emotion-driven buys during market highs. They oversee the entire estate planning process to ensure assets are passed along to the next generation as planned. Their goal is to teach individuals to leverage money to enhance their lives and the generations coming behind them, thereby breaking the “shirtsleeves to shirtsleeves in three generations” cycle.

“We address a surprisingly wide range of personal issues far outside the typical wealth manager's ‘job description,’” says Kimery. “In short, we try to help clients manage almost anything that keeps them up at night.”



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