EXPERIENCED AND INDEPENDENT ADVISORS WORKING PRIMARILY WITH ACCREDITED ENGINEERS, EXECUTIVES, AND ENTREPRENEURS

SARVER VROOMAN
WEALTH ADVISORS

9237 Ward Parkway, Suite 320 | Kansas City, MO 64114

from left: **Ron Dietz, CPWA®, CIMA®,** Partner, Wealth Advisor; **Kat Aguilar,** Operations Specialist; **Jonathan Sarver, CPWA®,** Managing Partner, Wealth Advisor; **Jessica Estes, MBA,** Operations Manager; **Peter Vrooman, CFA®, CIMA®, CRPC®, CAIA®,** Managing Partner, Wealth Advisor; **Thomas King, MS in Finance,** Partner, Wealth Advisor

The Sarver Vrooman Wealth Advisors Difference

At Sarver Vrooman Wealth Advisors, our goal is to offer our clients only the best. Here are some of the key reasons why we believe accredited clients are choosing Sarver Vrooman Wealth Advisors for their Retirement Planning and Holistic Wealth Management:

- Ranked in Forbes 2023 Best Wealth Management Teams for Missouri
- Consistent Team since 1999
- Educational Backgrounds (Univ. of Chicago, Boston University, Seton Hall, Univ. of Miami)
- Industry Designations (CIMA®, CFA®, CRPC®, CAIA®, CPWA®)
- Primarily Fee-Based Advisors: Our Interests are Aligned with our Clients
- Discretionary Portfolio Managers
- Client Education – Regular, Original Educational Seminars and Whitepapers
- Open Architecture/Non-Proprietary
- Comprehensive Retirement Plan for Each Client
- Holistic – We can Help with liability management, Social Security Analysis, Insurance, Charitable Gifting, and Refer Formal Tax Advice, Estate Planning, and Health Insurance to Outside External Partners
- Focus on Risk Management/Strong Risk-Adjusted Performance
- Practice Proper Asset Allocation: More All-Weather Approach
- Organic Growth – Clients Chose Us, We Didn't Acquire a Business
- Focus on Helping Primarily Accredited Engineers, Top Executives, and Entrepreneurs