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

Mission Statement and Covenant with Clients

Comprehensive Wealth Management

We offer comprehensive wealth management from experienced and independent Advisors working primarily with accredited engineers, executives, and entrepreneurs.

Education

We offer an approach of educating clients about retirement planning, asset allocation, income investing, the current state of the markets and the economy, and other wealth management topics through seminars, original written material and white papers, and scheduled meetings. Team members are committed to life-long learning, including earning advanced degrees, certifications, and licenses.

Community Support

Our team takes an active role in supporting children’s charities in the Greater Kansas City area, including Cornerstones of Care (formerly Ozanam), Boys and Girls Clubs of Greater Kansas City, and Casa of Johnson & Wyndotte County. In addition, the team has a history of mentoring college students. Past college students who have worked for the team have gone on to work for Morningstar, Bloomberg, Cerner, Waddell and Reed, and other successful companies.

Covenant with Clients

- We act in the best interest of clients.
- Our clients are the heart of our wealth management practice.
- We are committed to going the “extra mile” for clients.
- We focus on the client experience by being transparent, punctual, available, and honoring our commitments.
- We adhere to the highest standards and ethical code of responsibility including all firm, industry, Investments and Wealth Institute, and CFA Institute standards.
- We actively listen to clients to help ensure that their wealth management experience is customized to their unique situation.
- We focus on building long-term relationships with clients.
- We help clients develop a legacy, by encouraging both estate planning and an ethical will.
- We help financially educate the next generation of clients’ children.
- We ask clients how we can improve our service to them.

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