KEENEY™

FINANCIAL GROUP

Diligent. Distinctive. Dynamic.™

WELCOME TO YOUR 5-STAR WEALTH MANAGEMENT SERVICE.


DILIGENT.
DISTINCTIVE.
DYNAMIC.™

OUR COMMITMENT TO SERVICE IS BUILT AROUND YOUR FINANCIAL SUCCESS.

Your financial objectives and outlook are as unique as you are. A customized wealth management strategy should be tailored around your lifestyle and goals. It should also be dynamic in its ability to adapt and reflect a constantly changing backdrop in "real time." To help you reach those goals, you need and deserve a wealth management partner who's as committed and attentive as you are.

Through our 5-star concierge-style model, Keeney Financial Group has built the distinction of taking personalized service to a whole new level, starting from the very first time we meet. By getting to know you, your dreams and your investment style, we help you discover the difference between merely living and living well.

The financial world is dynamic and so is your life. To help you keep moving forward and remaining confident, Keeney Financial Group's focus on high-touch service is augmented by the latest financial planning and investment reporting technology. We're adaptive and nimble to help you capitalize on new opportunities that enhance your investment success.

Our long-term relationship with you begins by being meticulous listeners and continues as we design and manage your customized strategy. Our diligence extends as our experienced team guides you through a detailed planning process that integrates your long-term aspirations and assures that every option is explored and explained.

This depth of service helps us stand out from the pack and has proven to keep clients and staff around for decades.

- Our commitment to impeccable service is not only our mantra, it's evident in how the firm deploys resources – from client-facing technologies to state-of-the-art integrations, as well as staff incentives.

- Our experienced team will guide you through a detailed planning process, allowing us to learn your aspirations and concerns.

- We will be here to serve you every step of the way on our collective journey. Our relentless passion for innovative solutions and our attention to detail ensure that every option is explored when designing and managing your customized strategy.

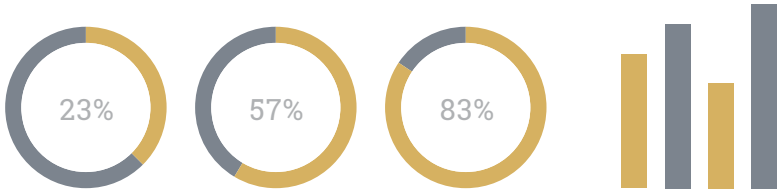
We are vigilant in proactively fine-tuning each asset management strategy aligned to your comprehensive financial plan.

DILIGENT RESEARCH FOR CONFIDENT PLANNING.

Our process begins with a simple but important conversation. You share with us your goals – for your finances, your family and your future – and we help you clarify your objectives and create a plan that supports your vision. We help simplify your financial landscape – we sift through the data, bring things into focus, provide a clear perspective and answer your questions.

Managing your wealth requires that we play an important and ongoing role in your life, financial and otherwise. Simply put, we are more than your money managers. We are your advocates, educators, counselors and partners, collaborating with you to plan confidently for your financial future. We work with you to anticipate and adapt to life's changes along the way.

Our advisors are the voice of experience, acting as an objective sounding board and providing knowledgeable advice with your goals and interests in mind. Perhaps most important, we care about you beyond your financial accounts and balance sheet. At the end of the day, your ability to relax and rest assured is the true measure of our success.



DYNAMIC SOLUTIONS
THAT ALWAYS
LOOK AHEAD.

The financial world is fluid, offering new opportunities for those who keep their eyes…and options…open. We utilize unbiased research to develop a personalized financial analysis, including recommendations based on fundamental principles of strategic asset allocation and diversification, as well as risk and tax management. Our concierge-style services assure you that we personally watch over and manage your investment plan with insightful adjustments to meet changing financial conditions.

To save you time and make your financial life even easier, our Wealth Management Tool consolidates all of your accounts, assets and information into your own secure log-in location, accessible to you and your professional advisors. Powerful analysis engines allow us to track changes in your assets and your life against your investment allocations. This tracking capability includes retirement and cash flow models, insurance programs and the financial and estate plans that you put into place. Integration of this data allows us to monitor your progress toward your goals in "real time."

Our advisors know the impact that remaining active and agile can have on helping you invest confidently and, ultimately, live well.

REVEL IN THE DIFFERENCE BETWEEN LIVING AND LIVING WELL.

What does my future look like? Can I maintain my lifestyle after I retire? How much is enough? How should I invest my money? How can I protect my family, now and in the future? Who can I turn to and trust for advice?

Your quest for financial success brings a growing number of questions and decisions to be made. It also brings options and opportunity. We live in a world of increasing complexity, with vast amounts of superfluous information coming at you from unlimited sources at dizzying speeds. Managing this wealth of information, and making sound decisions, is more difficult than ever. Yet, with so much at stake, it's never been more important.

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