FLYNN
Wealth Partners

We're proud to work with multiple generations of clients who rely on our team for objective advice and guidance along the path to pursuing their life goals.

COMPREHENSIVE PLANNING FOR YOUR LIFE AND LEGACY

Flynn Wealth Partners brings more than 60 years of combined experience helping individuals, families, and small businesses plan for their financial futures.

We’re passionate about helping our clients improve their lives and plan their legacies through a comprehensive approach to wealth management that emphasizes understanding. Our approach embraces proactive planning, education, regular communication, and the implementation of strategies that place client interests first.

As a family-owned and operated financial planning and wealth management firm, we’re large enough to provide knowledgeable service and thought leadership coupled with industry-leading resources, yet small enough to provide the kind of caring personal service our clients deserve across the full breadth of their wealth management needs.

We enjoy working with clients who bring different levels of financial knowledge and experience to the planning process. We find it rewarding to empower people by taking the time to explain and discuss concepts to make sure they are clearly understood.

Over the course of more than three decades, our focus on developing lasting relationships has never wavered. We’re proud to work with multiple generations of clients who rely on our team for objective advice and guidance along the path to pursuing their life goals.

AN UNWAVERING COMMITMENT TO PLACING YOUR INTERESTS FIRST

Our clients are accomplished individuals, families, retirees, business owners, and corporate executives seeking personalized strategies and guidance, coupled with independent advice.

We take great pride in delivering on our commitment to provide thoughtful financial insight, honest communication and caring service—the elements we consider essential to building lasting and mutually rewarding relationships.

As independent advisors we enjoy the freedom to place your best interests first, ensuring our advice, recommendations and strategies are fully aligned with your goals and objectives.

- Our relationship with you is based on honesty, trust, respect, and our ongoing commitment to your success.
- We place great emphasis on the role of financial education in empowering you to make well-informed decisions about your financial future.
- We develop personalized strategies, unique to your needs and aligned with your individual or business goals and values.

While we serve multiple generations of clients across a broad range of business, industry, academic, and government sectors, we bring familiarity and decades of experience working with many of Michigan's largest employers, including:

- Michigan State University
- The State of Michigan
- Consumers Energy
- General Motors

PROTECTING WHAT'S MOST IMPORTANT TO YOU IS CRITICAL TO US

At Flynn Wealth Partners, we understand that your financial and life goals are inextricably linked.

That's why our independent advisors take a proactive approach to financial and investment planning with the ultimate goal of helping to protect your lifestyle now and throughout retirement. We begin by learning what's most important to you and develop strategies aligned with your personal goals and objectives. As your financial coach, we take the time to educate you on your financial situation and the opportunities available to you, bringing clarity to even your most complex financial challenges in these and other areas:

- Financial planning
- Investment management
- Retirement planning
- Insurance planning
- College planning
- Income tax reduction strategies
- Estate and legacy planning
- Business financial planning
- Charitable gifting strategies

OUR PLANNING PROCESS

A truly personal approach to pursuing your goals

As your financial partner, we are committed to leading you with great care along the path to meeting your goals. We strive to bring continuity and consistency across all aspects of the financial planning and decision making process.

- Our disciplined approach to planning seeks to align your goals and values for a truly personalized approach to financial management.
- Our experienced team of independent advisors shares a passion for placing client interests first and enhancing the lives of each client they touch along the way.

Our comprehensive planning process focuses on learning everything we can about your financial situation, values, and lifestyle goals, and informing you about the full range of options and strategies for overcoming any challenges and pursuing your objectives. Through continual monitoring of your strategies and investments, we will make adjustments as your needs and the financial markets change over time. We will schedule regular reviews and meet with you whenever you have questions or concerns.

Retirement planning for individuals and businesses

For more than 30 years, we have provided objective advice and guidance to individuals and couples preparing for or living in retirement. Our comprehensive approach to retirement planning includes:

- Retirement accumulation planning
- 401(k), 403(b) plan rollovers
- Income planning in retirement
- Executive compensation planning
- Pension analysis
- Social Security benefits analysis

Corporate Retirement Plans

Flynn Wealth Partners brings dedicated resources and experience to assist businesses seeking tailored retirement plan solutions. With access to sophisticated investment tools and unbiased research, we are able to examine a broad range of providers and generate detailed reporting and comparisons for:

- 401(k) and other qualified defined contribution plans
- Defined benefit plans
- Non-qualified executive compensation plans
- Investment policy statement reviews
- 404(c) compliance reviews
- Employee education

ABOUT LPL FINANCIAL

Our independence is supported by LPL Financial, the nation's largest independent broker/dealer.* The firm provides access to a comprehensive array of tools and resources for independent financial advisors, enabling us to provide objective financial guidance to our clients. LPL has no proprietary products.

- As independent advisors, we have no obligations to investment product manufacturers, a parent company or shareholders.
- We have no cross-sell quotas or home-office directives that may lead to conflicts of interest.
- We spend our time developing customized strategies for the unique challenges you face.

*As reported by *Financial Planning* magazine, June 1996–2015, based on total revenue.

We invite you to contact us for a no-obligation consultation and learn why generations of our clients rely on Flynn Wealth Partners to provide the thoughtful financial insight, honest communication and caring service they have come to expect from our experienced team.

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