



## KEVIN GARRETT NAMED ONE OF TEN FIVE STAR WEALTH MANAGERS YOU NEED TO KNOW BY THE WALL STREET JOURNAL

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*The Wall Street Journal* has named Kevin Garrett as one of ten FIVE Star Wealth Managers you need to know from the South Atlantic region of the United States. Winners featured in the December 14th edition represented some of the South Atlantic's most dedicated wealth managers, each devoted to ensuring professional excellence and providing remarkable service to their clients.

You work hard and therefore you want your money to work hard for you with strong investments and financial planning that fits your family and your needs. So turn to a financial advisor that you can trust to assist you in pursuing financial freedom. Kevin Garrett is a three-year FIVE Star Wealth Manager winner. He and his team focus his extensive planning strategies around pursuing his clients' goals and dreams for themselves and their families before and during retirement. He specializes in assisting executives and business owners, with an emphasis on the unique needs and challenges that women face in today's world.

The Five Star Wealth Manager Award is a recognition program for wealth managers. Wealth managers are those individuals who help you manage your finances and/or implement aspects of your financial strategies.

Wealth Managers do not pay a fee to be considered or to be named a Five Star Wealth Manager. This award is based on sound research methodology and comes from an independent third party which allows it to be the cornerstone of an effective marketing program to positively set apart service professionals from their competition. Award candidates are identified by one of three sources; pre-qualification, firm nominations or peer nominations. Self-nominations are not accepted. Award based on 10 objective criteria

associated with providing quality services to clients such as credentials, experience, and assets under management among other factors.

Please be sure to reach out to Kevin Garrett to assist you with pursuing your financial goals.

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## ABOUT KEVIN GARRETT, AWMA, CFS



As an accomplished LPL Financial Advisor, Kevin and his team focus his extensive planning strategies around pursuing his clients' goals and dreams for themselves and their families before and during retirement. He specializes in assisting executives and business owners, with an emphasis on the unique needs and challenges that women face in today's world.

Prior to joining Integrated Financial Group, Kevin worked in the financial sector as a Partner in another Atlanta-based Financial Planning firm where he was an advisor to many of the firm's clients as well as acting as the firm's Chief Operating Officer and Head of its Financial Planning Department. Additionally, he was a

Financial Advisor on a wealth management team at Morgan Stanley Wealth Management Services.

Kevin received his bachelor's degree from the University of Alabama at Tuscaloosa. He completed The Executive Program for CFP® practitioner offered by the University of Georgia's Terry College of Business and has earned the Accredited Wealth Manager (AWMA) designation from The College of Financial Planning in Denver as well as the Certified Fund Specialist (CFS) designation from the Institute of Business & Finance in San Diego. He holds the Series 7 - General Securities Representative, Series 63 - Uniform Securities Agent and Series 65 - Uniform Investment Advisor registrations through LPL Financial. Additionally, he is a member of the Financial Planning Association (FPA).

Outside of his firm, Kevin is involved in the local community, most recently as a Committee Chairman with the North Fulton County March of Dimes, as well as being on Advisory Boards for the St. Jude Golf for the Kids Invitational and the Fulton County school system. Kevin is a member of the Atlanta Athletic Club where he has been active on the club's committees. He also coaches his son's league basketball team. He lives in the Atlanta area with his son and daughter.

Specialties:

- Retirement Planning
- Woman's Unique Financial Planning Needs
- College Education Planning
- Investment/Asset Allocation Advice
- Estate Planning
- Risk Management
- Strategic Planning



*Kevin has been awarded the FIVE Star Professional Wealth Manager in 2012, 2014 & 2015.*

Award based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers.

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