

Kendrick Wealth Management

Facing the Future with Anticipation

When a guy named Noah offers you a boating analogy, you should listen, especially when it may concern your future. “It’s not the direction of the wind, but the set of the sail that matters most,” states Noah Kendrick, CERTIFIED FINANCIAL PLANNER™ and Founder of Kendrick Wealth Management Group (KWM) in Carefree, Arizona.

KWM, an independent boutique practice aligned with Raymond James, takes a different approach to planning. Kendrick began his career during college at a small firm in Ohio during the technology downturn in the early 2000’s. The experience taught him valuable lessons about the importance of risk management and asset allocation within a portfolio.

Kendrick not only survived the financial crisis in 2008 and ’09, he more than tripled his business in the years following. “Those clients that stayed disciplined in an admittedly very challenging environment went on to benefit from the recovery that followed the worst economic downturn since the 1930s,” Kendrick notes.

KWM supports each client relationship by clarifying their specific vision of financial independence. What **FORM** does this take? KWM identifies four universal factors, but each with its unique goal: **F** (Family, Faith & Philanthropy); **O** (Occupational goals, achieving and maintaining a work-optional lifestyle); **R** (the Recreational bucket list) and **M** (Money). “The money is simply the **HOW**,” Kendrick observes. “That’s why you hire us; to build a

portfolio based on principles, priorities and timeframes connected to what matters most to you.”

There are three basic pillars—what Kendrick calls the 3 Ps—upon which KWM has established its distinguished reputation: investment philosophy, planning strategy and process. “Our investment philosophy is that tax, debt, risk and investment management all need to be aligned or your plan could be flawed,” Kendrick explains. “Second, we strive to bring clarity to the retirement planning process.” As the late great Yogi Berra once said, ‘If you don’t know where you’re going, you’ll end up someplace else.’ And third, life is not static, it’s fluid and dynamic and our proprietary process supports that belief.”

With so many investors expressing apprehension about the future, a well-defined planning strategy is more important than ever. “Excessive emotion is often caused by a lack of clarity,” Kendrick shares. “A well-developed planning strategy helps to bring clarity and allows our clients to face the future with the anticipation it deserves and to spend time on the things that matter most to them.”

Over half of KWM’s clients are retired to some extent. But communication and education is ongoing. “That’s part of what separates us,” Kendrick believes. “New clients often tell us that they have not heard from their previous advisor on a consistent basis.”

“How we do what we do is not inspiring; Why we do it is.”

The professionals at Kendrick Wealth Management Group are in the business of “serving a select group of core clients and their families,” Kendrick emphasizes. “The motivation behind our business is personal. My wife and I have two children under the age of three. Our business is about staying manageable and not becoming large at the expense of our core clients. I want the time to serve each client extremely well and the time to raise my children and enjoy my family. Our office won’t be all things to all people, but to the extent we can from a wealth management perspective; all things to some people.”



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