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Wealth Managers

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Client to Staff Ratio

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DEWAAY FINANCIAL NETWORK,
MEMBER FINRA, MSRB, SIPC

² SECURITIES OFFERED THROUGH
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INC. A BROKER/DEALER MEMBER
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SERVICES OFFERED THROUGH
SCHWAN FINANCIAL ADVISORS, LLC
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100 S. Brentwood Blvd., Suite 500
Clayton, MO 63105
314-726-2300 || www.monetagroup.com
Founded in 1905, Moneta Group is a financial advisory firm providing Family CFO services to a select group of successful families.

Searcy Financial Services, Inc.

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Plancorp, Inc.

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Founded in 1983, Plancorp is characterized by its unique, academic-based investment philosophy, its transparency of fees and its emphasis on its role as a fiduciary in the investment process.

Burns Advisory Group

9401 Cedar Lake Avenue
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405-478-1971 || www.burnsag.com
Burns Advisory Group's mission is to enhance the quality of their clients' lives through the delivery of the highest quality, value-added investment management and financial planning services.

Karstens Investment Counsel, Inc.

Regency Center
10250 Regency Circle, Suite 100
Omaha, NE 68114
402-492-2727 || www.karstensinvestments.com
Karstens Investment Counsel (KIC) was established in 1993. KIC provides clients with comprehensive wealth management solutions while upholding the highest standards of fiduciary care and personal service.

Retirement Investment Advisors, Inc.

3001 United Founders Boulevard, Suite A
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This fee-only firm embraces long term relationships and delivers a disciplined, conservative investment process that helps their clients enjoy a comfortable income for life.

DeWaay Capital Management¹

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800-722-9861 || www.theprofitzone.net
DeWaay Capital Management provides a level of sophistication normally reserved for the wealthy elite. They offer a holistic, integrated approach to wealth management and provide extensive access to alternative investments.

McCarthy Group Advisors, LLC

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Founded in 1986, McCarthy Group Advisors is fiercely independent in managing assets for clients who include individuals, corporations, non-profit organizations, partnerships and 401k plans.

Schwan Financial Group, LLC²

320 6th Ave SE
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Since 1984, Schwan Financial Group, LLC has analyzed clients' entire financial/estate plan, designed customized strategies and delivered ongoing plan management for families/businesses.

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5500 Wayzata Boulevard, Suite 200
Minneapolis, MN 55416
763-797-9577 || www.wadefinancialgroup.com
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