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Professional Guidance Offers Clients a Solid Financial Plan for Achieving Goals

Kendall Financial LLC

Building wealth through investments is only part of the equation for financial planning, says Ken Kendall, president and founder of Kendall Financial. Just as important is avoiding inefficiencies and maximizing your cash flow to achieve your objective.

With more than 45 years of experience in financial advising, Kendall understands that avoiding wealth transfers can be as critical for success as a high return on investments. His clients are often surprised to learn that many of the financial practices they follow are flawed and may be costing them money.

“I like to ask my clients: ‘If something you thought was true about money turned out not to be true, how soon would you want to find out?’ Most people would want to know ASAP.”

“I want to educate investors about the common mistakes most people make with their money,” says Kendall. “Many people have misconceptions about how to accumulate wealth, and those misconceptions result in wealth leakage.” Most people concentrate on accumulating wealth in their retirement portfolio, but rarely give much thought to the distribution phase.

“We believe that getting safely down the retirement mountain is even more important than getting up the mountain,” he says.

Individual Attention for a Successful Financial Plan

Kendall founded Kendall Financial in 1992 in Flower Mound, Texas, after many years of working with large financial services firms. Today, his team of financial



Left to right: (front row) Cydney Sullivan, Marketing & Events Manager; Bonny Sharp, Client Service Manager; (back row) Ken Kendall, CLU, CFP, President and Founder; Brian Hesler, Investment Consultant/Financial Adviser; Terrell Tipton, Financial Adviser; Jack Kendall, CLU, ChFC, RHU, Planning Consultant

advisers has a combined 85 years of experience and manages about \$100 million in assets. He is a Chartered Life Underwriter (CLU), a Certified Financial Planner (CFP®) and an Investment Adviser Representative in the state of Texas. He is also an affiliate of The Breakaway League, a national organization of financial professionals who educate the public about financial literacy.

Kendall Financial clients are mostly individual investors who are looking to grow their wealth for retirement or family legacies. Unlike many financial advising firms, Kendall Financial has no minimum income or asset requirement.

Creating a solid financial plan for clients starts with understanding their objectives, and then identifying financial inefficiencies and maximizing opportunities to help them achieve their desired result.

Kendall Financial has identified more than two dozen areas of potential wealth inefficiencies. The firm’s advisers begin the financial planning process with an examination of five key areas: general debt, mortgage options, taxes, college funding and retirement planning.

“We frequently find clients are throwing away money and wealth due to misinformation,” says Kendall. “Many people also don’t realize how spending habits can cripple their financial goals. For example, most people will spend more money on the cars they drive to work than they will accumulate in their retirement plan at work.”

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“Financial planning can be stressful if you go it alone,” he says. But with the help of an experienced professional, you gain the peace of mind that comes from knowing you have a clear path to achieve your dreams.

“A sound financial plan and a purpose-driven financial planner can take away much of the anxiety and worry you would experience otherwise,” says Kendall. “We don’t believe financial planning is a do-it-yourself weekend project.”



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