

A Life Planning Firm

Welcome to our family firm, my name is Jim Kennedy. *Life Planning* may be unknown terminology, but it is the very definition of the business we have been developing for over 30 years. In 1989 every client I worked with was gathering information from several different advisors and legal professionals, then trying to compile that information on their own to find the right answers for their situation. Inevitably, everyone I met with had holes or overlap in their plan, that was the genesis of Life Planning. It wasn't about the answers, it was about asking the right questions that need to be asked for your family's unique situation. Only then do we begin coordinating and correlating all the answers from all of your financial professionals to send you in the right direction with confidence so that you can *live Life on purpose*.

As the number of experiences with our clients has grown, so has our knowledge and wisdom. Our vision is to be an industry leader providing continuous **Leadership, Relationships and Creativity**. All the while we believe in doing things the *cowboy way*. Our word is our bond and our handshake is more binding than any contract. I encourage you to take some time and read about our approach to planning or simply the *cowboy way* we live.

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The KFS Culture - We believe in doing things the *cowboy way*

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8 Life Planning Issues - The core of our business is *8 life planning issues*. Find out what these issues are and how they apply to you

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