

ABOUT US

OUR SERVICES

OUR PHILOSOPHY

OUR THINKING

EDUCATION

CONTACT

OUR FOCUS AREAS

Your financial journey is one-of-a-kind. We're ready to work with you on your terms, every step of the way.



READY TO RETIRE

Baby boomers Beth and Steve look forward to life's next chapter, one filled with travel, time with grandchildren, and intellectual engagement as part-time consultants. Having spent the last three decades accumulating a \$1 million nest egg, they now wonder how to transition from accumulating wealth to spending it to support their desired lifestyle.

- Converting their nest egg to income
- Starting Social Security

- Choosing a living community

I'M READY
([HTTPS://KUHNADVISORS.COM/AUDIENCE_LANDER/READY-TO-RETIRE/](https://kuhnadvisors.com/audience_lander/ready-to-retire/))



MID-CAREER PROFESSIONALS

John and Erin have advanced degrees, three young children, and extremely busy lives. Focusing on their careers and family leaves them little time to prioritize financial goals.

- Allocating savings between retirement and college accounts
- Picking investments for their retirement portfolio
- Obtaining tailored financial advice in a world of generic information

WHAT'S NEXT?
([HTTPS://KUHNADVISORS.COM/AUDIENCE_LANDER/MID-CAREER-PROFESSIONALS/](https://kuhnadvisors.com/audience_lander/mid-career-professionals/))



SOCIAL CHANGE AGENT

Mary volunteers on the board of Refugees First, a not-for-profit organization providing education and career training to refugees from war-torn countries. Mary and her fellow board members rely on income from the organization's \$5 million endowment to fund programs and services.

- Choosing a stock/bond mix that balances income generation with growth opportunities
- Selecting investments aligned with the organization's social values
- Educating board members on investment topics so they can focus on envisioning the future

RESPONSIBLE INVESTING

([HTTPS://KUHNADVISORS.COM/AUDIENCE_LANDER/SOCIAL-CHANGE-AGENT/](https://kuhnadvisors.com/audience_lander/social-change-agent/))



VALUES DRIVEN

Anna and Sarah aim to align their values with all aspects of their life, from career paths to shopping habits and even to investment choices.

- Building a portfolio with socially responsible investments
- Family and charitable gifting strategies
- Ensuring their own financial sustainability in retirement

WHAT'S NEXT?

([HTTPS://KUHNADVISORS.COM/AUDIENCE_LANDER/VALUES-DRIVEN/](https://kuhnadvisors.com/audience_lander/values-driven/))



INDIVIDUALIZED APPROACH

For more than 20 years, Kuhn Advisors has partnered with a wide variety of individual and institutional clients and their families to help them accumulate, manage and grow their financial resources.

Our individualized approach to wealth management seeks to provide solutions across a spectrum of goals from financial security in retirement to supporting charitable organizations to leaving a legacy for future generations. From offices in Durham, N.C., and Denver, Co., we serve clients across the United States.

[LEARN MORE \(/OUR-PHILOSOPHY/\)](/OUR-PHILOSOPHY/)

[CONTACT US \(/CONTACT/\)](/CONTACT/)

IS YOUR NEST EGG EVERYTHING IT'S CRACKED UP TO BE?

The challenges facing today's retirees are unique. Low interest rates, sky-rocketing healthcare costs, longer life expectancies, and complex Social Security rules all make the conventional retirement wisdom of the past obsolete.

LEARN HOW WE APPROACH THE CHALLENGES (/RETIREMENT-CHALLENGES)

"If you don't stand for something, you'll fall for anything."

UNKNOWN



MEET OUR TEAM

At Kuhn Advisors, our client-centered approach to investing makes you a partner in planning for your long-term financial success.

MEET KUHN ADVISORS (/OUR-TEAM/)



CRISIS AS OPPORTUNITY

Scott Ranby, CFP

FINANCIAL ADVISOR



Mark Kuhn

FOUNDER



Sylvia Scott

ADMINISTRATIVE ASSISTANT

NEWSLETTER SIGNUP

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EMAIL ADDRESS

FIRST NAME

Subscribe

North Carolina

Kuhn Advisors, Inc

3622 Lyckan Parkway
Suite 1001
Durham, North Carolina 27707
Phone: 919.493.3233

Colorado

Kuhn Advisors, Inc

2373 Central Park Blvd.
Suite 100
Denver, Colorado 80238
Phone: 303.803.1016

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[NEWSLETTER \(/OUR-THINKING/\)](#)

[MAP AND DIRECTIONS \(/DIRECTIONS/\)](#)

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