

[\(https://thefamilywealthgroup.com/\)](https://thefamilywealthgroup.com/)

(tel:8593090349) (tel:8593090349)859.309.0349 (tel:8593090349)

(tel:5027491439) 502.749.1439 (tel:5027491439)

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(<https://login.orionadvisor.com/login.html?g=6ad25fdc-1d37-4c1d-80b1-f64d1cd5c2e5&e=4&i=1200>)

 MENU

[FINANCIAL SERVICES \(HTTPS://THEFAMILYWEALTHGROUP.COM/FINANCIAL-SERVICES/\)](https://thefamilywealthgroup.com/financial-services/)

[OUR TEAM \(HTTPS://THEFAMILYWEALTHGROUP.COM/OUR-TEAM/\)](https://thefamilywealthgroup.com/our-team/)

[ATTEND AN EVENT \(HTTPS://THEFAMILYWEALTHGROUP.COM/ATTEND-AN-EVENT/\)](https://thefamilywealthgroup.com/attend-an-event/)

[IN THE MEDIA \(HTTPS://THEFAMILYWEALTHGROUP.COM/IN-THE-MEDIA/\)](https://thefamilywealthgroup.com/in-the-media/)

[SCHEDULE A MEETING \(HTTPS://THEFAMILYWEALTHGROUP.COM/SCHEDULE-A-MEETING/\)](https://thefamilywealthgroup.com/schedule-a-meeting/)

 MENU

RETIREMENT PLANNING

**WEALTH MANAGEMENT DESIGNED  
TO LAST**

We create financial strategies that allow clients to enjoy more of what they earn.

LEARN HOW

## GET STARTED IN 3 EASY STEPS:

### **1. DISCOVER**

Schedule a meeting (<https://thefamilywealthgroup.com/schedule-a-meeting/>) to sit down with us and discover what your ideal retirement looks like.

### **2. EVALUATE**

Using The Family Wealth Group Plan (<https://thefamilywealthgroup.com/financial-services/>), we'll examine your current

financial situation and determine your retirement needs.

### **3 . P L A N**

Receive a custom strategy designed to help you reach your unique retirement goals.

**LET'S GET STARTED ([HTTPS://THEFAMILYWEALTHGROUP.COM/SCHEDULE-A-MEETING/](https://thefamilywealthgroup.com/schedule-a-meeting/))**

**INSTANT DOWNLOAD**

**Will your retirement  
be affected by the  
Trump Tax Laws?**

With this 10-page instant download, written by one of Washington's savviest political observers, you'll discover:

- ✓ How your taxes could be affected by the Trump tax change – today and in retirement
- ✓ Ways to help ensure your portfolio is as tax efficient as possible
- ✓ Strategies designed to make sure you don't give Uncle Sam a penny more than necessary

[DOWNLOAD NOW! →](#)

## NEED MORE INFO? ATTEND A LIVE EVENT

Attend one of our seminars and learn how you can prepare for your best retirement and feel more confident about the days ahead.

**JULY 9**

Dinner Seminar

6:00 pm | **Malone's Prime – Lexington** 3373 Tates Creek Rd  
Lexington, KY (Kentucky) 40502

REGISTER  
(HTTPS://THEFAMIL  
YWEALTHGROUP.C  
OM/EVENT/LOUISVI  
LLE-DINNER-  
SEMINAR-6-20-2/)

## JULY 10

### Lunch and Learn

12:00 pm | **Bonefish Grill** 2341 Sir Barton Way  
Lexington, KY (Kentucky) 40509 United States

REGISTER  
(HTTPS://THEFAMIL  
YWEALTHGROUP.C  
OM/EVENT/DINNER  
-SEMINAR/)

## JULY 11

### Dinner Seminar

6:00 pm | **Malone's Prime – Lexington** 3373 Tates Creek Rd  
Lexington, KY (Kentucky) 40502

REGISTER  
(HTTPS://THEFAMIL  
YWEALTHGROUP.C  
OM/EVENT/DINNER  
-SEMINAR-2/)

## GET TO KNOW OUR TEAM

It is our mission to help individuals and families achieve their ideal retirements.

### MEET OUR FOUNDER

It's our responsibility to assess your financial situation and only make recommendations that are in your best interest, and we do so with integrity and transparency.

» **Meet Our Founder**

(<https://thefamilywealthgroup.com/our-team/>)



**KEVIN METZLER**  
CEO, FOUNDER AND PRESIDENT

## SERVICES WE OFFER

Once we understand your financial situation, we can help you decide which types of products and services fit within your financial strategy.

» **Learn More**

(<https://thefamilywealthgroup.com/financial-services/>)



READY TO TAKE  
**THE NEXT STEP?**

For more information about any of the products and services we provide, schedule a meeting today or register to attend a seminar.

[\(HTTPS://THEFAMILYWEALTHGROUP.COM/  
A-MEETING/\)](https://thefamilywealthgroup.com/a-meeting/)

[\(HTTPS://THEFAMILYWEALTHGROUP.COM/  
AN-EVENT/\)](https://thefamilywealthgroup.com/an-event/)

 Or give us a call at 859.309.0349



(<https://thefamilywealthgroup.com>)

## **CONTACT US**

Email: [mail@familywg.com](mailto:mail@familywg.com) (mailto:  
[EMAIL%20ADDRESS])

P: (859) 309-0349

## **VISIT US**

 LEXINGTON, KY

 LOUISVILLE, KY

 LONDON, KY

 SOMERSET, KY

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(<https://vimeo.com/familywealthgroup>)

(/blog/)

We are an independent financial services firm helping individuals create retirement strategies using a variety of investment and insurance products to custom suit their needs and objectives.

Investment advisory services offered by FWG Investments, LLC., an SEC-Registered Investment Advisor.

\*Guarantees provided by insurance products are backed by the claims-paying ability of the issuing carrier.

Registration does not imply a certain level of skill or training. “The 10 Things to Know About Planning Your Retirement Income” report is provided for informational purposes only. It is not intended to provide tax or legal advice. By requesting this report, you may be provided with information regarding the purchase of insurance products in the future.

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