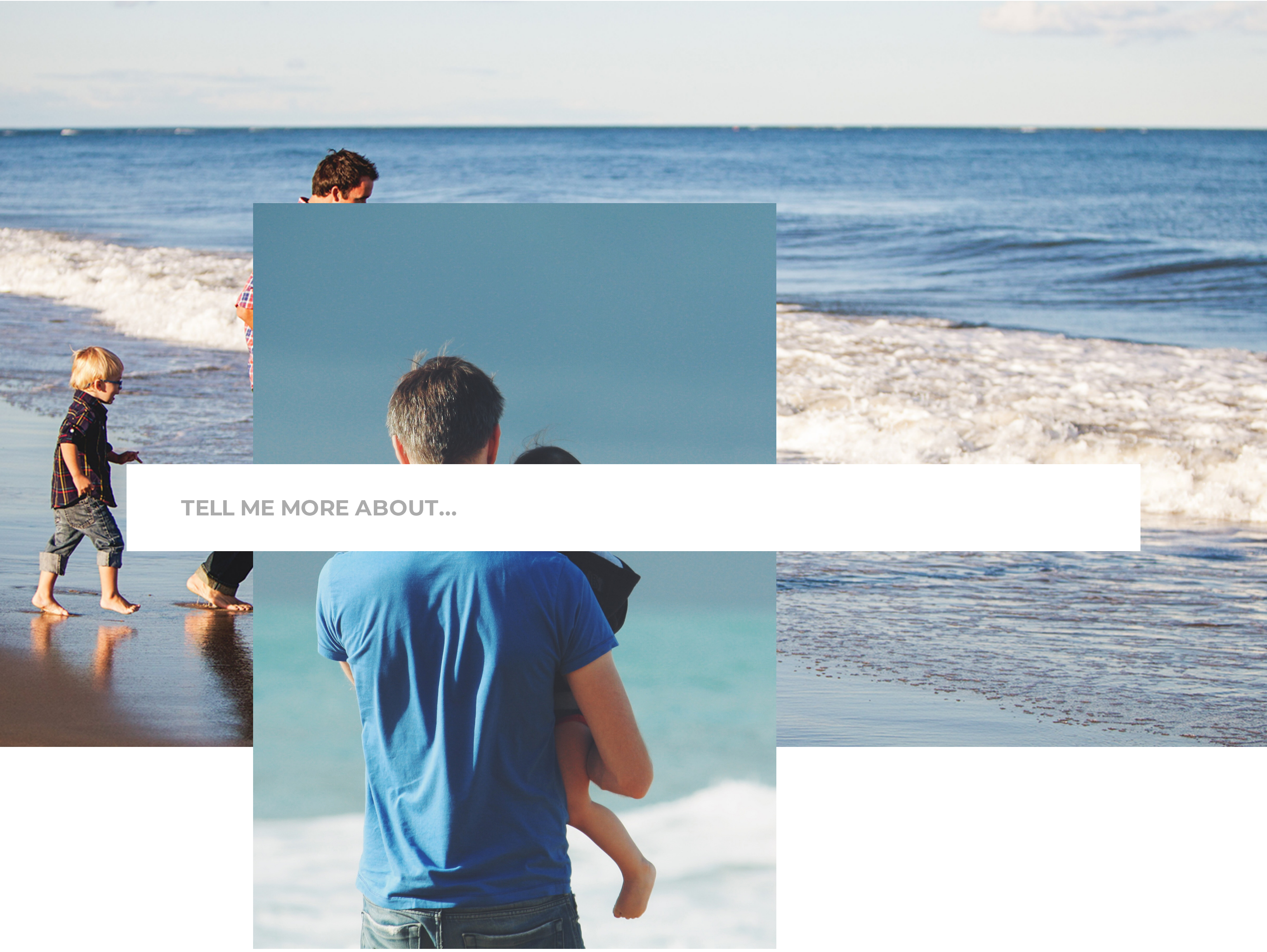
Let your legacy span generations. Comprehensive wealth planning built with your individual needs in mind.

MEET OUR TEAM



TELL ME MORE ABOUT...

Meeting your needs at every life stage

Your personal needs change based on the stage you are at in your financial life. Your investment options should change to meet you at every step along the way.

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Goal-based wealth planning

Wealth planning for life, not just retirement. A successful wealth plan will help you clarify, prioritize, and achieve your goals.

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Investment advice

Your greatest success forms the basis of our holistic investment advice. We offer comprehensive advice for every step in the investment process.

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Meet our thought experts

With decades of combined experience in the financial industry, our members have become some of the most seasoned voices in their field. Uniting this core wealth planning knowledge with the common goal of seeing our clients succeed allows us to make the greatest positive impact possible. We owe much of this success to the relationships we build with every interaction. Our clients are like family, and we see them through generations of success. We believe that a relationship built on trust and clarity helps meet financial milestones with ease.

“By taking a holistic and highly individual approach to investment, we are creating new potentials for success at every turn.”

Rob Lyons, CFP ®

MANAGING PARTNER & FINANCIAL ADVISOR

Rob Lyons has spent nearly 40 years in the financial services industry. A native of Canada, Rob graduated with his MBA from the prestigious Ivey Business School at Western University in London Canada in 1980. Rob began his career with Wood Gundy Inc., Canada's largest investment firm at the time. In 1982 he joined Shearson American Express in Sarasota, Florida. During his 26 years there, he earned numerous awards for his client services. He was an early proponent of the Financial Planning process and became a CERTIFIED FINANCIAL PLANNER™ (CFP®) designate early in his career.

Rob joined UBS Financial Services in 2008 where he continued his career as a Financial Advisor. He has been a member of the UBS Director Club all seven full years of his tenure at the firm. After 36 years in the industry, Rob made the decision to take his knowledge and expertise and start his own firm, Generations Wealth Planning. Rob's focus has always been to focus on the client's entire family and making sure that their legacy is taken care of.   Rob, his wife Amy, and their four sons enjoy the beauty of Sarasota, and all believe it is important to give back to their wonderful community.

Our client relationships are built on a foundation of trust, propelled by the knowledge it takes to succeed."

ROB@GENERATIONSWP.COM

Kevin Lyons

PARTNER & FINANCIAL ADVISOR

Kevin is a Sarasota native and proud founding member of Generations Wealth Planning. After graduating from Western university in London, Canada, Kevin spent years working for some of the biggest companies in finance. He spent time at Merrill Lynch, where he specialized in financial planning analysis. His later position at UBS further strengthened his background in private wealth management.   To Kevin, wealth management is a very personal experience. *Talking with someone handling your wealth should be* *an open and honest conversation*. As this familiar feeling is such an important part of his life, Kevin welcomed the opportunity to found Generations Wealth Planning with his father Rob.

Kevin has always been fascinated by the power that the financial market has to create change. He uses this passion every day as a financial advisor for Generations Wealth Planning. His role allows him to use his strengths to create powerful long lasting relationships with everyone he comes into contact with.

"There is a powerful feeling in helping people achieve their financial goals...Knowing that you are a part of creating a lasting legacy is extremely fulfilling"

KEVIN@GENERATIONSWP.COM

Kelly Morris

CLIENT RELATIONSHIP MANAGER

Originally from the Midwest, Kelly and her family are now long time Florida residents. Kelly is a veteran of the financial services industry, and holds her Series 7 and 66 Securities licenses. Kelly takes pride in the strong personal relationships she builds as the client relationship manager here at Generations Wealth Planning. She plays a vital role in directing clients through difficult aspects of their wealth plan. Kelly simplifies things like cash management and tax reporting; making complex ideas easily approachable for every person she comes into contact with. Her wealth of knowledge and bright attitude are the driving force behind our day to day outreach to clients.

To Kelly, the most fulfilling part of her role at Generations Wealth Planning is the ability to get to know clients on a personal level. She goes out of her way to make sure our clients are familiar and comfortable with every step of the wealth management process. Kelly loves helping others to achieve their goals, and celebrates every milestone we reach together.

"The personal approach we take here makes all the difference. Our clients really are like family, and having this trusting relationship makes every success much more rewarding."

KELLY@GENERATIONSWP.COM

Terry Hastings

FINANCIAL ADVISOR

Terry is originally a native of Scotland. His golfing skills first brought him to the US. He completed his business degree at the University of San Francisco in December of 2011.

Terry then began his career in the financial services industry as a Financial Advisor at Merrill Lynch in 2012 in the Mill Valley CA office.

After several years at Merrill Lynch in California, Terry moved to Charles Schwab in New Orleans LA. As a Financial Consultant he built a sizable consulting practice featuring strong relationships with existing and new clients. Terry's focus with his clients was on financial planning and investment strategies.

Terry is delighted to be working with Generations Wealth Planning, a Sarasota Florida based Registered Investment Advisory firm. He brings the same focus on long term relationships with clients, many of whom have complex multi-generational financial situations.

Generations Wealth Planning has access to a wide variety of Financial Planning products and services. GWP clients assets can be held in the custody of a multiple number of nationally-known investment firms.

Terry enjoys being active in the community, travelling, beach days, and is an avid golfer.

TERRY@GENERATIONSWP.COM

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STAY UP TO DATE!

Staying on top of the latest news in the market is vital. From tips and strategies to new investment options that may be right for you; our newsletter is the best way to stay updated around the clock.

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