

## PETER MALLOUK, PRESIDENT OF CREATIVE PLANNING, FINANCIAL ADVISOR, AND AUTHOR



Peter Mallouk was on *Worth's* list of 100 Most Powerful Men and Women in Global Finance (2018 and 2017) as the only person on the list who advises clients. He's the *only* financial advisor to have been featured at No. 1 for three years in a row (2013-15) in *Barron's* "Top 100 Independent Financial Advisors in America." As President of *Creative Planning*, Mallouk has found further success, garnering a No. 1 ranking in *Barron's* as the top Independent Wealth Management Firm in America (2017) and being featured twice as the No. 1 Independent Wealth Management Firm in the U.S. by CNBC (2014 and 2015).

While much of the praise may be recent, Peter's approach has been anything but. According to Peter, "The wealth management industry is starting to go independent, avoid proprietary products, reduce tax consequences, and focus on needs-based investing. Creative Planning started doing that 15 years ago. As *The New York Times* says, "Creative Planning is at the vanguard of a profound shift in personal finance" as we build what *Barron's* declared as a "family office for all."

Creative Planning manages over \$37 billion for clients in all 50 states and abroad. Suffice it to say, Peter's knowledge and expertise in wealth management is earning far more than praise.

# THE 5 MISTAKES EVERY INVESTOR MAKES AND HOW TO AVOID THEM: GETTING INVESTING RIGHT

Is there anything worse than making a costly investing mistake? Yes – making the same mistake over and over again. In his book, *The 5 Mistakes Every Investor Makes and How to Avoid Them*, Peter focuses on what investors often do wrong so they can set themselves on the right path to success. Readers will learn to navigate the ever-changing variables and market dilemmas that often make investing a risky and daunting endeavor. Peter also shares useful investment techniques, discusses the importance of disciplined investment management, and pinpoints common avoidable mistakes made by professional and everyday investors alike.

Designed to provide a workable, sensible framework for investors, *The 5 Mistakes Every Investor Makes and How to Avoid Them* will teach investors how to refrain from certain negative actions, such as fighting the market and misunderstanding performance. It will also teach investors how to keep letting one's biases and emotions get in the way of investing success.

## THIS BOOK WILL HELP YOU:

- Learn and understand the major mistakes made by both professional and everyday investors
- Acquire the strategies and mindset necessary for navigating ever-changing variables and market dilemmas
- Realize a clear and concise approach to successful investing



PETER MALLOUK, J.D., MBA, CFP®

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## NOTEWORTHY INTERVIEWS AND PRESS

“ We have to be able to do what we do for all clients, which is give them our best advice but give them the power to adjust as they wish.

*The New York Times,*  
“A Kansas  
Investment Firm  
Spurring Change on  
Wall Street”

“ The marketplace is speaking to the fact that people want what Creative Planning does.

*Underdog*

“ Once you eliminate the broker conflict, make sure you understand the talent that’s available to you in the wealth management firm you hire.

*Inc.*, “5 Investing  
Insights from

“ We are also believers in alternatives for the affluent, having private real estate, private equity or private lending.

*IREI*

“ No. 1 Independent Wealth Management Firm in America.

*Barron's*

## AWARDS AND ACCOLADES

In addition to those mentioned earlier, Creative Planning was featured in *Forbes* in 2016 as the No. 1 RIA for growth over the past 10 years, and *Financial Times*' "Top RIA List" (2014-18). Creative Planning has also been featured in *Ingram's* magazine for "Best Places to Work" (2015) and "Most Charitable Organizations (2010)."

While Peter is certainly proud of the awards and recognition he's received in wealth management, he is most appreciative of all the ways it's allowed him to give back. Peter is the founder, current executive board member, and former five-year Chairman of KC CAN!, an organization of volunteers dedicated to improving the quality of life of children in Kansas City.

Peter is a recipient of the Ernst & Young Entrepreneur of the Year Award. Peter and his wife, Veronica, are the recipients of the Giving the Basics Human Dignity Award for their contributions toward helping those less fortunate meet basic needs. They are also recipients of the Variety Presidential Citation Award for their work supporting those with special needs. Peter has served on boards for Pathway to Hope, American Stroke Foundation, St. Michael's Finance Council, Kansas City Hospice, and KC CAN!

Peter is married to Veronica and has three children: Michael, JP, and Gabby.

## FEATURED BLOG POSTS

### ICE, ICE BABY!

Do the recent data hacks and rash of identity theft give you heartburn? Peter Mallouk walks you through one simple way to freeze your credit accounts so that no one, not even online thieves, can access your credit report.

### BITCOIN AND THE SHIP OF FOOLS

One of the hottest recent trends is Bitcoin and blockchain, but there is some confusion about their ins and outs. Peter Mallouk gives a primer on these markets and points out the potential, and pitfalls, interested investors should consider.

### 10 WAYS TO KEEP YOUR FAMILY SAFE

It seems like every day there's a new cyber-threat to our identities, property, and even personal safety. Peter Mallouk offers 10 simple ways to ward off the sometimes dangerous digital busybodies who don't always have your best interests in mind.

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