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Wealth Management Since 1969

Capitalize on your greatest opportunities and steer clear of your worst fears to create your best lifetime experience.

Two Proven Steps To Build A Secure Future

We understand that your life and wealth present questions and challenges outside of asset management so we developed the tools to build a secure future.

STEP 1: The Wealth Navigator System™

A five-step, goal-based process towards creating a game plan for your financial security.

Our team starts with a one-on-one meeting with you to discuss your needs and financial goals. Whether you are planning for retirement, want to minimize taxes, have recently sold an asset, or are creating a road map for the next generation, we're here.

Our goal is to build multi-generational relationships focused on supporting you and your family. Learn more about how our unique planning process can benefit you.

⬇️ [Download The Wealth Navigator System™ Brochure \(https://www.kossolinger.com/wp-content/uploads/2018/04/Step-1-The-Wealth-Navigator-System-planning-process.pdf\)](https://www.kossolinger.com/wp-content/uploads/2018/04/Step-1-The-Wealth-Navigator-System-planning-process.pdf)

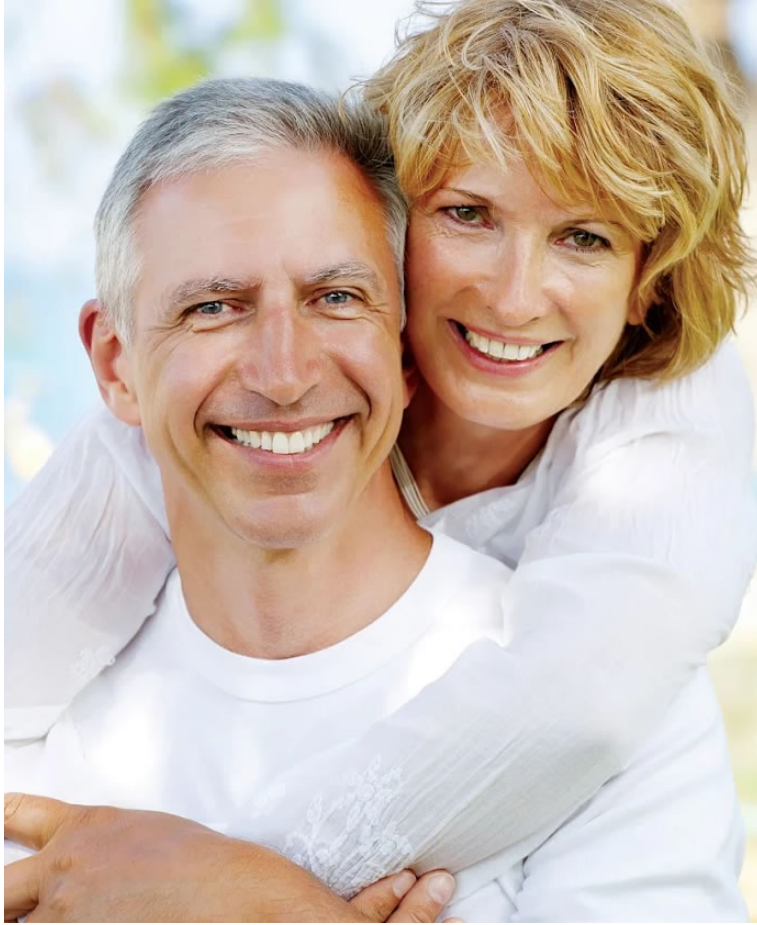
STEP 2: The Wealth Manager™

Now that you have a game plan for your life, assets, and investments, it's time to take action

You can implement your plan yourself, utilize someone you currently work with, or hire Koss Olinger or a firm like Koss Olinger to put your plan into action.

If you choose Koss Olinger, we utilize our trademarked implementation process, The Wealth Manager™. The Wealth Manager™ is a proven system of implementation and monitoring that helps keep you, your assets, and your investments on track while helping you reach your goals.

⬇️ [Download The Wealth Manager™ Brochure \(https://www.kossolinger.com/wp-content/uploads/2018/04/Step-2-The-Wealth-Manager-management-of-money.pdf\)](https://www.kossolinger.com/wp-content/uploads/2018/04/Step-2-The-Wealth-Manager-management-of-money.pdf)



Koss Olinger News

May 2019 Market Review
(<https://www.kossolinger.com/may-2019-market-review/>)

By Koss Olinger
(<https://www.kossolinger.com/author/kossolinger/>) |
Jun 1, 2019

To download the May 2019 market review
please click here.

Tim Roark Promoted to Partner
(<https://www.kossolinger.com/tim-roark-promoted-to-partner/>)

By Koss Olinger
(<https://www.kossolinger.com/author/kossolinger/>) |
Jun 10, 2019

We are pleased to announce that Tim Roark,
CFP® has been promoted to Partner. This
promotion is an important career milestone

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Read More →
(<https://www.kossolinger.com/may-2019-market-review/>)

by which we recognize his commitment to our firm, the community and the high performance that he has demonstrated throughout his career with us. Tim began his financial services career with us in 2011...

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(<https://www.kossolinger.com/tim-roark-promoted-to-partner/>)

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