3GENERATIONS WEALTH MANAGEMENT

Wealth Planning for Current and Future Generations

Team 3Gen was built to serve you. Collectively, we offer decades of experience, which we dedicate to crafting innovative, thoughtful financial strategies for clients.

OUR MISSION

Our Team was built to serve you. Collectively, we offer decades of experience, which we dedicate to crafting innovative, thoughtful financial strategies for clients. We take the time to get to know your lifestyle, goals and values, as well as your families so that we can deliver a plan designed to propel you toward the future you've envisioned for yourself and your family. Offering the breadth of resources and capabilities of a large corporation, we provide the tailored, attentive service of a small firm.

When implementing a financial strategy, we leverage the full expertise of our team, conducting thorough research before hand-picking investments that are consistent with your tolerance for risk and are designed to help you achieve your objectives. We offer independent guidance, with your financial needs and preferences at the center of everything we do.

We advocate for your families generational financial success, through persistent management and on-going guidance. By utilizing the full bandwidth of our firm's knowledge and expertise, we provide the service and counsel necessary to enhance your financial outlook and propel you toward your goals.

MEET TEAM 3GEN

OUR DYNAMIC "TEAM 3GEN" APPROACH DEDICATES A TEAM OF PROFESSIONALS, EACH WITH UNIQUE SPECIALIZATIONS AND NICHES, TO BEST SERVE ALL THE FINANCIAL GOALS OF OUR CLIENTS.

EDGAR (TED) G. INGRAHAM, PRINCIPAL

Ted founded American Heritage Securities, Inc. and EGI Financial, Inc. in 1992 after spending eleven years working as a Financial Advisor at a major national investment firm. His objective was to provide a structure to serve clients on a more personal basis and at a lower cost.

Ted brings a long history of investment management and a wealth of experience to our clients. During his career, Ted has developed a proprietary investment strategy that focuses on a stocks characteristics. Ted's primary role with the 3Gen Team is portfolio construction and security selection.

Ted is a member of the Akron Area Chamber of Commerce, Past President of the Sales and Marketing Executives of Akron and the Akron Torch Club. A competitive cyclist, Ted is a member and five-time past president of the Summit Freewheelers Bicycle Club. Ted lives in Akron with his wife, Karen.

BRIAN WEINREICH, PRINCIPAL

Brian started his career with Prudential Securities in 1998 and spent nine years with Merrill Lynch before moving to American Heritage Securities and EGI Financial in May of 2009. Brian believes in a planning-based approach to investing client assets focused on the individual client's tolerance for risk and time horizon. Brian's investment process works exceptionally well for individuals and small business owners making the transition from the accumulation phase to the distribution phase of their life.

Brian grew up in Parma, Ohio and graduated from Kent State University. He and his wife Jana have two daughters, Macy and Dylan. Brian currently holds the series 4, 7, 9, 10, 24, 63, and 65 licenses as well as the State of Ohio Insurance license.

TYLER A. KRUMMEL

Tyler A. Krummel joined our team in May 2015. Tyler started his career with the Investment & Trust Group of Richland Bank, where for four years he successfully provided financial guidance to trusts, charitable foundations, small businesses, company retirement plans and individual investors. He has experience in money management and personal financial planning. His thorough understanding of investment principals, a sincere sensitivity to client priorities and personal qualities of integrity and character align with the high caliber of service we strive to provide our clients.

Tyler attended Ashland University where he earned a BSBA in Finance and Business Management. He is currently working on his MBA with a specialization in Finance and holds series 7, 63 and 65 security licenses in addition to the State of Ohio Insurance licenses. Tyler is also a Certified Financial Planner (CFP®) candidate and plans to sit for the board exam in 2019. While at Ashland, Tyler played varsity football where he honed his competitive skills, learned teamwork and the values of discipline and hard work.

A native of Fairlawn, Ohio, Tyler enjoys participating in many organizations in our local community. He dedicates his leisure time to his strong passion for fitness and sports, and spending time with family and friends.

SERVICES

3GEN WEALTH PLANNING

Team 3GEN designs customized, wealth plans to help guide individuals, families and businesses through unique challenges and opportunities to achieve their lifestyle goals.

- Budgeting & Savings Strategy
- Wealth Accumulation Planning
- Retirement Income Planning
- 401(k) Allocation Guidance
- Tax Planning
- Education Planning
- Debt Elimination
- Charitable Giving

LEARN MORE ABOUT 3GEN'S WEALTH PLANNING

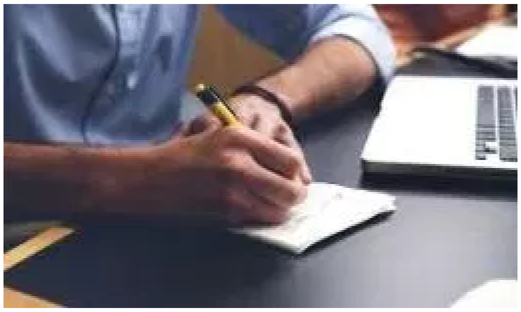
INVESTMENT MANAGEMENT

Our team takes a unique approach to individualized, investment management and portfolio design based upon our guiding **Investment Philosophy** in coordination with your Wealth Plan.

LEARN MORE ABOUT OUR INVESTMENT PHILOSOPHY

BUSINESS TRANSITION & 401(K) SERVICES

We take pride in guiding business owners and employees through the complex business retirement plan universe. Working directly with business owners, we establish a customized, cost effective plan to best fit the structure and goals of the company and its employees. Furthermore, we provide employees education on the diverse investment options and individualized planning to help reach their personal retirement goals.



LEARN MORE ABOUT BUSINESS RETIREMENT PLANS

Significant wealth is most often held through the business for most entrepreneurs and business owners. The transition of your wealth and business is a delicate, comprehensive and intensive process, to say the least. Our job is to help protect and transition your business as you advance to the next phase of your life.

LEARN MORE ABOUT BUSINESS SUCCESSION PLANNING

NEWSLETTER

June Market Commentary

May Market Commentary

April Market Commentary

March Market Commentary

October Market Commentary

TRAGEDY AND COMEDY

Posted on July 2, 2019

LIONS AND TIGERS AND BEARS! (OH MY)

Posted on June 3, 2019

HOURS & INFO

655 West Market Street
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M-F 9:00 a.m. - 5:00 p.m.

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AdvisorInfo

BrokerCheck

Team 3Gen is affiliated with EGI Financial & American Heritage Securities