

# Alan Turner

*President – Financial Consultant  
A. Turner Financial, LLC*

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## **VALUE STATEMENT**

I help develop estate plans for businesses and individuals. Teaming with the appropriate tax and insurance experts, I help create a tax-efficient wealth management plan for my clients and their families.

## **WEALTH MANAGEMENT APPROACH**

Our Wealth Management approach integrates your objectives into a personalized plan that can be updated as life changes occur. We combine our sophisticated investment planning tools with our professional resources to help match your objectives with customized strategies.

- *Understanding Your Financial Objectives* —  
We begin by asking questions to understand you and your financial objectives.
- *Determining Smart, Time-Tested Strategies* —  
Next, we qualify and quantify your financial and personal information to match your objectives with sound strategies.
- *Implementing Thoughtful and Creative Strategies* —  
Using these strategies we develop customized strategies tailored to your objectives, drawing from a wide selection of products and services.
- *Providing Timely, Ongoing Service* —  
We periodically review your situation to help ensure your financial objectives are being met.

## **QUALIFICATIONS**

Prior to joining L.M. Kohn & Company, I worked at RBC Wealth Management for seven years. I also spent 16 years in the telecommunications industry, most recently assisting corporate clients in cost-effectively improving the communications flow in their workplace. In addition to my Series 7 and Series 66 licenses, I am also a registered Insurance Agent. Additionally, I was a Captain serving in Operation Desert Storm in 1991 as a Communications Officer.



## **PERSONAL**

I am married and the proud father of four terrific sons and two wonderful stepchildren. I have been residing in Overland Park, Kansas for approximately 20 years. My interests outside of work include tennis and traveling.

## **STATE REGISTRATION**

I am licensed to serve clients in the following states: Alabama, California, Colorado, Iowa, Kansas, Massachusetts, Missouri, North Carolina, Texas, and Virginia.

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