# Matthew McWherter

## CFP®

## Financial Advisor

### CERTIFIED FINANCIAL PLANNER™ practitioner

**MY APPROACH**

I help my clients achieve their dreams for today, tomorrow, and well into the future — using our exclusive Confident Retirement® approach. It starts with a personalized conversation about covering essentials, ensuring lifestyle, preparing for the unexpected and leaving a legacy. By breaking your financial goals down into doable steps, we can help take the uncertainty out of planning for your financial future. Take a few minutes now for a quick confidence check.

I'm here to help you live the life you've earned. When you have the right financial advisor, life can be brilliant.

**Interests**

I'm a lifelong resident of the Chicago area but serve clients across the U.S. from New York to Southern California. When I'm not working with clients you might find me golfing, scuba diving, running a 5K, or just enjoying time with family and friends. I'm also committed to several philanthropic efforts, including River Grove Lions Club activities, the Rally for the Cure® Golf Outing, and Les Turner ALS Foundation and St. Baldrick's.

**Areas of Focus**

- Retirement Income Strategies
- Estate Planning Strategies
- Insurance
- Wealth Preservation Strategies

- Retirement Planning Strategies
- Investments
- Executive Compensation and Benefit Strategies

**Qualifications**

- CFP® CERTIFIED FINANCIAL PLANNER™ practitioner

**Education**

- BA Finance, Illinois State University- Normal, IL
- BA Insurance, Illinois State University- Normal, IL

**Professional Associations**

- Financial Planning Association