



NEXTGEN WEALTH FACT SHEET

Founded: December, 2014

Headquarters: Kansas City, Mo.

About: NextGen Wealth is a fee-based Registered Investment Advisor (RIA) headquartered in Kansas City, MO. Founded in 2014 by Clint Haynes, CFP®, NextGen Wealth provides financial planning and investment management services to high earning young professionals and retirees. The company prides itself on its progressive, forward-thinking culture and infuses industry-leading technology into the practice to optimize client results and experience. Services offered include comprehensive financial planning, investment management, retirement planning, tax and college planning, charitable planning, and insurance services.

Services:

- Financial Planning
 - Investment Management
 - Retirement Planning
 - Tax Planning
 - College Planning
 - Insurance
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Key Differentiators:

- Independent
 - CFP® Designation
 - State Registered Investment Advisor
 - Customized Investment Solutions
 - Forward-Thinking Culture
 - Personal Approach
 - Implements Emerging Technologies
 - Hourly & Flat-Fee Billing
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Leadership: Clint Haynes, CFP®, Found & President

Online: www.nextgen-wealth.com, Twitter: Clint_NextGen, Facebook & LinkedIn: NextGen Wealth