Why People Choose Weyers McKeever Financial Partners

We believe our clients choose to work with Weyers McKeever Financial Partners because of our wisdom, integrity, and creativity. We provide leadership, capability, and a process that we believe helps clients design the lifestyle they desire. We believe the real benefit we bring to our clients is comfort, confidence, and clarity in the vision they have for themselves and the people they love.

Our Process Our team follows the CERTIFIED FINANCIAL PLANNER™ process of financial planning. This means, creating a solid financial plan requires doing some homework—both on your part and the part our team. From examining your current situation, to setting goals, to deciding how to measure your progress, we are uniquely qualified to take you through the financial planning process and assist in building your personal holistic roadmap.

The seven steps in our process are:

1. Understanding your Personal and Financial Circumstances
2. Identifying and Selecting Goals
3. Analyzing your Current Course of Action and Potential Alternative Course(s) of Action
4. Developing the Financial Planning Recommendations
5. Presenting the Financial Planning Recommendations
6. Implementing the Financial Planning Recommendations
7. Monitoring Progress and Updating

Our Mission is to provide leadership, creativity, and collaboration through our team process which we believe results in confidence and clarity.

Our Vision is to be our clients' most trusted resource as a result of our shared processes, holistic strategy, and valued relationships.

Our Investment Adviser Representatives are fiduciaries and are legally and ethically required to act in your best interest.

Meet The Team

Jay W. Weyers, CFP®
Partner
Financial Planner

Scott McKeever
Partner
Financial Advisor

Carrie Weyers
Partner
Director of Operations

Linda Grizley, CAP®
Financial Advisor
Director of Marketing

John Schinzer
Business
Development

Kasey Cacciottolo
Administrative
Assistant

Jennifer Yearous
Case Design
Manager

Maggie Gomez
Administrative
Assistant

Candy Carrasco
Marketing
Coordinator

Weyers McKeever
FINANCIAL PARTNERS

Your Vision • Our Team

Weyers McKeever
FINANCIAL PARTNERS

Holistic Financial Planning for Individuals, Families, and Businesses

Your Vision • Our Team

9201 South IL State Route 31
Lake in the Hills, IL 60156
(815) 455-5292
www.weyersmckeeverfinancialpartners.com

How We Work With Individuals & Families

Led by our CERTIFIED FINANCIAL PLANNER™, Jay Weyers, our team of financial professionals, financial advisors, and support staff work together with you in creating your unique financial vision.

We can help you address:

- Personal financial planning
- Business planning
- Retirement planning
- Investing principles and strategies
- Retirement investing and distribution strategies
- Estate conservation issues
- Risk management
- Legacy planning
- Family protection planning
- Business protection planning

We can answer your questions, including:

- Can I retire early?
- Are my investments working hard enough?
- What's a good approach for college savings?
- What are the elements of a sound estate strategy?
- Do I have enough life insurance for my family?

We help you examine all phases of your financial life.

- Accumulation
- Distribution
- Legacy

We believe that the best financial plan is a comprehensive one. Our approach looks at all aspects of your financial life. We use a holistic system that utilizes the flow of money between assets and gives a big picture view of current and future finances.

Our experienced professionals have helped many people just like you with similar issues and concerns. We can help you address your individual situation.

How We Work With CPAs

Through our affiliation with National Life Group® we are proud to offer the CPA Advantage® Program.

Financial Advisors and CPAs are complementary professions who both play a part in overall financial planning. CPA Advantage® is a detailed program, with proven processes, to help CPAs and financial professionals build trusting relationships and provide value added services.

We believe that by partnering our services, we can help CPAs broaden the scope of services they offer and provide their clients with advanced planning strategies and solutions.

Establishing the right relationship can be a win-win for both parties.

Why work with us? We believe CPAs choose to work with Weyers McKeever Financial Partners because of our professionalism, open communication, and collaborative approach.

The real benefit for the CPA is that Weyers McKeever Financial Partners allows CPAs to retain their role as a trusted advisor with the added benefit of additional team members who work together and follow through with comprehensive planning aspects so that all parties are well informed and prepared.

The real benefit for the clients is that they can have the knowledge that their taxes and financial plans are working toward their personal and business goals.

We provide CPE Seminars for CPAs and can come to your location.

How We Work With Business Owners

As a business owner, you work hard to build success.

We work hard to give your financial situation the attention it needs and deserves.

As holistic financial professionals, we look at the big picture. We want to be sure that both your business and your family are protected.

We help with tax and retirement strategies and collaborate with you in creating a sustainable future for your lifestyle and your business.

No matter which stage you are in, building, growing, or transferring your business, there are financial solutions that can help get you where you want to go.

- What keeps you up at night?
- Do you have a properly planned exit strategy?
- Do you know if you can sustain your lifestyle in retirement?
- Do you have an exit strategy for the unexpected?
- Are you paying too much in taxes?
- Are you limited in how much you can set aside in your retirement plan?
- Are you concerned about losing key employees?
- Are you able to reduce business and personal taxes?
- How can you continue to receive the benefits of your success when you retire?
- What would you like to accomplish?
- What is your business worth?

Let us help bring you some comfort, confidence, and clarity.

We do not offer tax or legal advice. For advice concerning your own situation, please consult with your appropriate professional advisor.