At KMG Private Wealth Management your well being is our most important investment.

Our team seeks to transform your goals into tangible realities by building relationships founded on trust. We empower our clients with thoughtful advice and personalized financial planning strategies, thereby providing you with the freedom to discover your dreams, goals and objectives in life.

Jim Koliatsis, Partner, CFP® is a seasoned LPL financial advisor and the *Principal* of KMG Private Wealth Management with over 15 years of experience in the financial industry. Jim continually strives to help clients and their families plan for their financial future that goes beyond making investments. Jim, a CERTIFIED FINANCIAL PLANNER™ , has broad knowledge of the markets and the overall economy and uses this skill set to partner up with clients to work toward their life goals. Jim's industry experience and management skills have made KMG Private Wealth Management one of Chicagoland's well-known financial advisory groups.

Ryan W. McCain, Partner, CFP® is a CERTIFIED FINANCIAL PLANNER™ , and has been advising clients for 14 years. Ryan is an extremely proud alumnus of Ohio State University. Ryan is also is a Board Member and an active "Angel" with Imerman Angels, a one-on-one cancer support non-for-profit organization. Ryan is a founding member of KMG and a senior advisor on the team. Ryan uses his expertise in market analysis and adaptation in addition to portfolio construction to design our clients' financial road maps. Ryan is the *Chief Investment Strategist*, taking the lead in creating personalized investment portfolios and managing allocation updates per client needs.

Greg S. Tong, Partner, CIMA® has been in the financial services industry since 2000, and has been a registered advisor for 10 years. Greg has valuable experience from both UBS Paine Webber and LaSalle Financial Services. With a Bachelor's degree from Arizona State University, Greg uses his ability and training to recognize your experiences, background, and viewpoints in helping you come up with the proper path to your financial course. Greg oversees the firms' strategic relationships with numerous investment management companies whom we actively utilize. He is our *Director of Investment Research* and attended The Booth School of Business, University of Chicago, to obtain his Certified Investment Management Analyst® certification.

Thomas Muscarella, Client Service Manager joined KMG Private Wealth Management in 2011, after graduating from Virginia Tech where he majored in Finance, Insurance and Business Law, and also completed the distinguished Virginia Tech's CFP® board registered program. Thomas has had extensive experience in managing finance, administration, operations and investor relations. Throughout his tenure at Virginia Tech, Thomas constantly emphasized the importance of philanthropy in each of his leadership positions. At KMG, Thomas manages all aspects of client service, including account maintenance, contribution and distribution management, RMD planning and the Account View portal. Thomas works with the senior advisors to improve and build on the KMG client experience.

Dan Riesmeyer, Operations Manager is licensed through LPL Financial with Series 7, 63, 65 security registrations along with his life and health insurance license. He has been with KMG Private Wealth Management since 2010, initially as a summer intern during his undergraduate years, and came on board June, 2012 in a full time capacity after graduating from the Farmer's School of Business at Miami University. Dan manages new accounts, alternative investment implementation and is the product sponsor liaison. He oversees back office operations and ensures the functionality of the account management process.

Determine what *true wealth* means to you