Legacy Living Financial Strategies™

KENNEDY WEALTH GROUP™

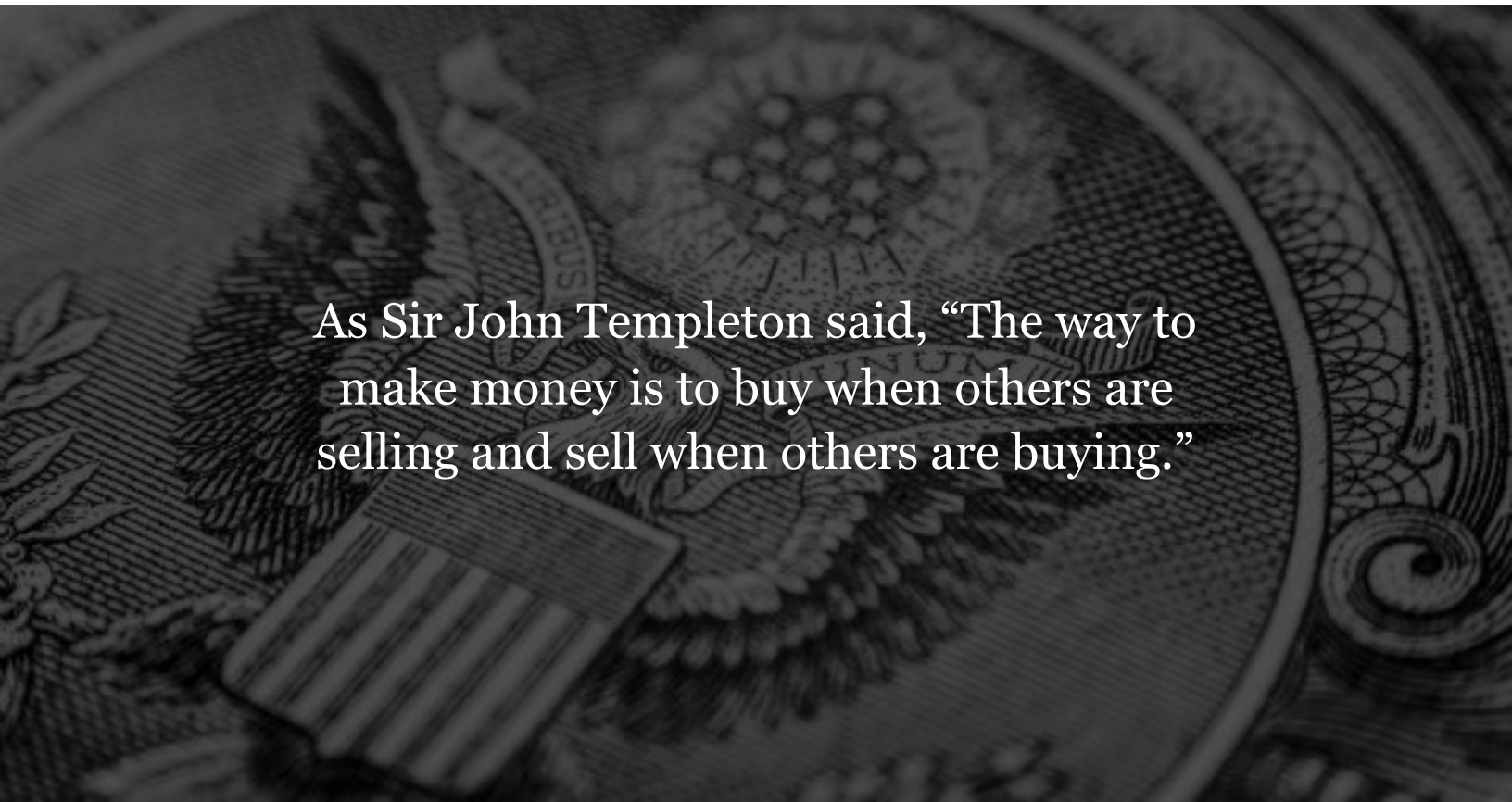
Austin, TX | Bethalto, IL | Quincy, IL

THE HOUSEHOLD ENDOWMENT MODEL®

Comprehensive Wealth Planning

Jeff Kennedy
Financial Planner, Managing Partner

Kennedy Wealth Group is a comprehensive, relationship oriented services firm providing custom financial strategies. Founded by Jeff Kennedy, a former U.S. Navy fighter pilot, our firm fights to protect your financial future and the legacy you'll leave behind. We are a team of dedicated financial professionals who are with you every step of the way, helping to guide you on your path to financial freedom.



Legacy Living

Financial Strategies™

Legacy Living Financial Strategies™ means on-going retirement-planning in areas of wealth management and preservation, asset protection, tax reduction, income planning, wealth transfer and distribution. We believe retirement-planning should be comprehensive and personal.

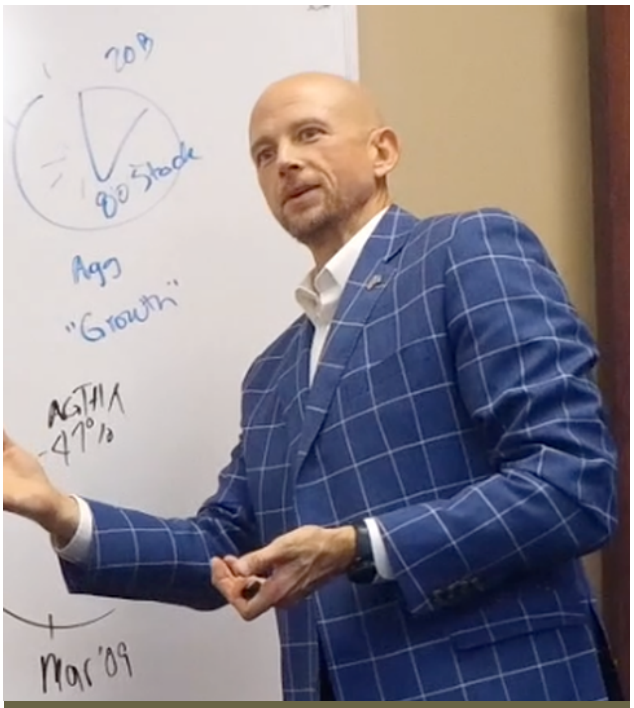
We agree with Warren Buffett that,
"There is always a bull market somewhere."

Legacy Living Financial Strategies™ means opportunity in non market-correlated alternatives that offer outsized returns. It means providing true diversification while keeping an eye on long-term growth. It means systematic wealth acquisition and helping our clients' legacy for future generations.

We look for non-correlation through off-Wall Street investment opportunities in real estate and private equity offerings similar to those utilized by very large institutional money managers. Institutional investors know this as the Yale Endowment, but refer to it as the **"Household Endowment Model."**

In most cases, Kennedy Wealth Group targets a minimum allocation of 30% of the portfolio to market-insensitive assets (cash, bonds and absolute return). We further seek to limit illiquid assets (venture capital, leveraged buyouts, real estate and natural resources) to 50% of the portfolio.

THE HOUSEHOLD ENDOWMENT MODEL®



Jeff Kennedy
Financial Advisor
Managing Partner

We consider ourselves to be "tactical" wealth advisors. In the same way Kennedy flew fighter aircrafts in the U.S. Navy, we strive to take targets of opportunity in the marketplace while maintaining the flexibility to get out of harm's way when need be. The nature of tactical investing is exceptionally complex. But the solutions can be extremely simple–once you know where to look. We at Kennedy Wealth Group provide our clients with access to a broad range of tactical investment solutions designed to simplify the complex needs of each of our very individual clients and provide them with true portfolio diversification.

16	7	12	42
Years of Experience	Licensed States	Team Members	Strategic Partners

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