



### KIRK J. WALD

Independent  
Financial Advisor

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Kirk specializes in working with retirees and pre-retirees who desire financial security and a life-long relationship with a trusted advisor. Since 2001, **Retirement Security Planners, Inc.** operates a client-focused firm specializing in income planning, wealth preservation, and legacy planning. Our financial services and planning firm provides clients with peace-of-mind. Kirk has helped hundreds of clients to enjoy dignified, worry-free retirements. Clients who have taken his advice have avoided unnecessary market losses and gained a sense of certainty about their future. Kirk's approach is: "Great Offenses win games; great Defenses win championships".

## MORE ABOUT KIRK

Kirk has been a University Place resident since 2000, along with his wife, Laura and their three children. He is a graduate of The Ohio State University's Fisher School of Business and a US Army Veteran. Kirk is an expert in safeguarding and growing client's net worth and retirement income. He shows clients how to re-align existing assets from unsafe, unsuitable or underperforming vehicles to **safer, more suitable** or **better performing** vehicles, based on their unique situation and needs. Kirk does this by assisting clients in understanding their entire financial situation, their opportunities, and any threats to their financial wellbeing, including unnecessary taxation. After discovering your needs and goals, we work together to design and implement a holistic solution, unique to your unique situation. As a fiduciary, Kirk is obligated to put your needs ahead of his own, or of the companies he may represent.