KANE
WEALTH GROUP

DAVID KANE
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KANE WEALTH GROUP
Financial Advisor
RAYMOND JAMES FINANCIAL SERVICES

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WHAT WE DO

We help clients navigate through life events such as:

RETIREMENT

Careful planning and saving in the years before retirement may help ensure a smooth transition from employee to retiree.

We help organize and manage retirement decision-making options, helping retirees make the most optimal financial decisions.

WEALTH TRANSFER

The death of a loved one is an emotional and trying time. Estate preservation strategies, financial planning, and wealth transfer may not be the primary issues on clients' minds in a time of grief.

We have assisted many with the details, advice, and services needed during this difficult time.

CAREER TRANSITIONS

Changing jobs or careers can lead to relocation, a new home, altered spending habits, and financial and emotional adjustments. Reevaluation of a long-term financial plan is a requirement for investors during these times.

We can help review your plans and make objective recommendations to lay a solid foundation for your future.

MARRIAGE & DIVORCE

A marriage involves joining finances, budgets, priorities, and goals. Unfortunately, divorce is an ever-present reality in today's society and requires tailored re-design of strategies to uniquely meet the goals of separated partners.

We devote time and attention to make the union or division of two lives' goals go as smoothly as possible.

OUR COMMITMENT

FOCUS ON LONG-TERM RELATIONSHIPS

Together, we build relationships built on trust, confidence, and in-depth conversation. We provide personalized products and services that reach beyond any single transaction.

PUTTING YOUR INTERESTS FIRST

Our paramount objective is to help achieve your financial goals.

RESPECT AND COURTESY

Your trust represents the cornerstone of our business. Expect nothing less than respectful, courteous, and quality service.

PERSONALIZED SERVICE

Detailed personalized reports and reviews allow you to objectively evaluate and understand your portfolio. The use of these resources and tools allow for the strategic design, implementation, and monitoring of your wealth management strategies.

QUICK RESPONSE TO INQUIRIES

We provide quick and effective responses to all your financial and administrative questions and concerns.

Our process involves a comprehensive evaluation of the entire range of your financial needs, both investment-related and non-investment related, and our recommendation for accomplishing your goals.

> ***My goal is to thoroughly understand your financial needs and align our resources to help meet or exceed them. I take pride in navigating clients through difficult market conditions by maintaining a conservative approach to investing while evaluating near-term concerns and planning for long-term goals.***

> ***My core strength is developing a personalized, clearly defined strategy for each and every one of our clients. I am at the center of your financial relationships by providing appropriate solutions, offering seasoned advice, and staying ahead of future developments.***

WEALTH MANAGEMENT SERVICES

We use Raymond James resources to combine personalized investment and wealth management services with tailored in-depth financial advice. We utilize a wide range of professional services and resources targeted to the needs of our clients.

INVESTMENT CONSULTING

- Assist with establishing goals
- Determine risk tolerance and return expectations
- Determine optimal asset allocation
- Conduct manager searches and performance reviews

ESTATE PRESERVATION STRATEGIES, INSURANCE AND RISK MANAGEMENT SERVICES

- Working with your attorney to develop trust strategies
- Long-term health care
- Succession and business-related issues

FINANCIAL PLANNING

- Comprehensive financial planning services
- Net-worth and asset allocation analysis
- Retirement planning
- Education savings accounts

DAVID KANE, *Financial Advisor*

Since 1992, David has been helping investors like you through the process of pursuing their financial goals so that they can focus on the most important things in life. With the insight and industry knowledge that comes with over 28 years in the business, David provides his clients the information they need to choose the most suitable investment products and services for their specific financial needs, including financial planning, retirement planning, estate planning, wealth management, and more. David is originally from South Holland, IL and is a graduate of Illinois State University where he earned a Bachelors of Science degree in Finance. He and his wife, Mylene, have been married for 30 years and reside in Naperville, IL with their three children, David, Dillon, and Jeni.

SUZANNE LESPERANCE
Relationship Manager

With over 25 years of experience in the financial services industry, Suzanne helps us maintain the high level of service we provide to our clients. Knowledgeable and responsive, she provides timely, accurate, and meaningful answers to our clients' questions and makes sure their needs are always her greatest priority. Suzanne also provides support for our team's client accounts, schedules and prepares documents for client meetings, and assists with marketing efforts. Before joining our team in March, 2021, Suzanne was a Senior Client Service Associate at Morgan Stanley. Suzanne lives in Aurora, IL with her husband Dave and their two children Daniel and Andrea.