# OUR TEAM. YOUR FUTURE.

Retirement and Financial Strategies is a locally owned and operated business that was created to offer you a highly focused resource for your financial planning and investment management needs.

We offer investment management services, comprehensive financial and retirement planning, as well as risk management for possible premature death and/or long term care health needs.

270-215-2600 www.retirementandfinancial.com

## Benefits of an Advisor Team:

- Receive advice from multiple perspectives as well as education and experience levels
- A team offers the highest level of service
- Clients can reach out to any member of our advisor team for timely advice
- Provides continuity for our clients that can last multiple generations

# Team of Advisors

With 25 years experience as a financial advisor, Jerry's role as company President has developed into providing ongoing consultation, leadership and experienced advice to the financial advisor team as advisor team leader. Jerry also oversees the customer service staff and overall company operations.

Emma and Evan work directly with our clients as financial advisors. They conduct client review meetings, consultations, and communications. They develop and implement financial plans and investment strategy for our clients as a team with Jerry.

Our customer service support staff works closely with our advisor team to provide our clients with consistent and reliable service.

Jerry Goetz
CFP®, CFS®, CRPC®

Jerry is a 1993 cum laude graduate of Western Kentucky University. He became a CERTIFIED FINANCIAL PLANNER™ professional in 2002 and also gained his Certified Fund Specialist designation (2004) and Chartered Retirement Planning Counselor designation (2008).

Since 1999 - through both negative and positive market periods - Jerry has helped clients build strong financial and retirement strategies. Proper planning involves careful analysis, developing a custom strategy and taking action. Jerry believes that a strong financial foundation allows you more time, energy and resources to focus on the personal things in life that mean the most to you.

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Emma Goetz
CFP®

Emma is a 2021 summa cum laude graduate of Western Kentucky University with a Bachelor of Science in Finance with a Personal Financial Planning concentration. She gained her Investment Advisor Representative certification in 2022 and became a CERTIFIED FINANCIAL PLANNER™ professional in 2023.

Emma works to create every client relationship, no matter how big or small, with a foundation, purpose, and path to financial freedom. Trust is of utmost importance in every relationship, and Emma is dedicated to building and maintaining trust with her clients.

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Evan Goetz

Evan is a 2023 summa cum laude graduate of Western Kentucky University with a Bachelor of Science in Finance with a Personal Financial Planning concentration. He gained his Investment Advisor Representative certification in 2023 and is currently working towards further designations.

Evan works to develop trust and strong relationships with our clients by working to develop financial and investment plans to suit each client’s objective and needs.

## Contact Us:


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