Keener Financial Planning

FINANCIAL PLANNERS & WEALTH MANAGERS

If you think all wealth management firms are the same, think again. Some, like Keener Financial Planning, offer uncommon yet refreshing and welcome services. In the past 12 years, Keener Financial Planning has established itself as a firm that assists clients from all different financial backgrounds. Regardless of a client's asset size, income, or net worth, Keener Financial jumps in to help. It's a fee-only financial planning firm that not only provides holistic guidance but also assists clients with individualized goals, such as major purchases, college savings, and budgeting. When Jean Keener, founder, was looking for her own financial planner years ago, she wanted investment guidance, but also big-picture financial consultation. Because this was so difficult to find, it planted the seed for a business idea. "Our clients appreciate that we help them customize a plan uniquely to them," Keener says. "We use a collaborative process, and we work with clients on an as-needed basis, meeting them where they are now and guiding them to where they want to be. This has been part of our DNA since the beginning." Patty Priddy, lead planner at Keener Financial Planning, says the firm's clients are often relieved that an appointment with a Keener planner doesn't mean they are required to turn over their assets. "We can provide investment advice for clients to implement on their own or full-service wealth management, whichever works best for the client's situation."

Keener Financial Planning has grown through the years, starting with only Keener in 2008 and growing to eight employees, five of whom are CFPs®. Keener and Priddy, who are both named among *D Magazine*'s 2020 Best Financial Planners, worked in other related industries before becoming financial planners. Priddy joined the firm in 2017, after learning about Keener's approach. "I love that we can work with all types of clients and can help them in a multitude of ways," she says. Keener and Priddy, along with the rest of the team, share a desire to approach clients with respect and integrity, always offering objective fiduciary advice.

From left to right:
Jean Keener, CFP®, CRPC
Kelli Hinton, FPQP
Rachel Songer, CFP®
Christina Slavonik, CFP®
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