Gary Vawter

CFP®, ChFC®

Gary began advising clients on finanical matters in 1985 and started his own firm, Vawter Financial, in 1990. After receiving his undergraduate degree in finance from The Ohio State University, he went on to become a Certified Financial Planner professional and earn a Master of Science (MS) degree in financial planning from the College for Financial Planning, as well as the Chartered Financial Consultant ChFC designation. He also holds an advanced Estate Planning and Taxation (EPT) certificate from the American College.

Gary has been actively involved and held leadership positions within the industry, on both local and national levels. He has spoken on financial planning and business ownership topics to audiences around the country. He regularly contributes to various media outlets including The Wall Street Journal, Reuters, Dow Jones Newswires, Columbus CEO, and Business First, along with appearances on 610 WTVN radio shows.

Gary and his wife Misty have three kids. When schedules permit they enjoy family vacations to lake houses, snow skiing and golfing destinations.

Learn more about what Vawter Financial can do for you at www.vawterfinancial.com

VawterFinancial
Personalized Wealth Management

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Our success is achieving **your** goals

VawterFinancial
Personalized Wealth Management

We are dedicated to developing personalized plans that help you make the best wealth management decisions for your unique goals.

Putting Your Interests First

Vawter Financial, an independent fee-only financial services firm, specializes in providing comprehensive wealth management services. Our mission is to help clients achieve their unique goals through trusting relationships with a commitment to those whose lives we touch. We hold ourselves to a fiduciary standard, placing your interests first at all times. Our philosophy is simple – we only succeed when you achieve your goals.

Managing Your Wealth

At Vawter Financial, we collaborate with you to design a financial plan that aligns your money with your life and core values. As fee only advisors, we do not recommend financial products on a commission basis. Instead, we take a holistic approach to managing your wealth, offering six core services to help ensure your needs are met.

Investment management – utilize strategic asset allocation strategies to construct broadly diversified, tax-efficient portfolios

Income tax planning - implement an array of strategies designed to minimize the amount of taxes paid on accumulated wealth and current income

Estate planning – work to create the most efficient and cost-effective plan to help ensure your wealth passes to your intended beneficiaries

Cash flow planning – determine cash flow needs for larger goals, such as retirement and education planning, and devise methods to help accumulate capital and distribute assets in a tax-efficient manner when needed

Risk management – educate about risk exposures and assist with securing any necessary insurance coverage

Debt management – review outstanding debt and ways to minimize the cost, including referrals to qualified lending specialists

Building Client Relationships

For over 30 years, we have been building client relationships based on trust, unbiased professional advice, continual communication, and prompt personal service.

Our clients are successful small-business owners, self-employed, and/or uniquely wealthy individuals who seek unbiased advice and solutions to help them achieve their comprehensive financial objectives.

Staying Connected

Our role as your trusted advisor is ongoing. After designing and implementing your financial portfolio, we continue to review its progress on a regular basis, making changes as needed to help ensure that it is on track with your objectives. In addition to regular meetings, informative videos and newsletters, Vawter Financial clients can easily access their accounts and stay current with firm and market happenings by visiting our website or LinkedIn®, Twitter, and Facebook pages. We also provide clients their own interactive website that includes a client vault to store and exchange important financial information.

You can be confident that you will gain a team of dedicated professionals who listens and cares, and has the experience needed to help you define and achieve your long-term personal financial goals.