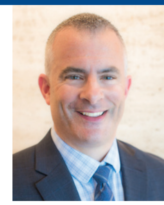
EXPERIENCED AND INDEPENDENT ADVISORS WORKING PRIMARILY WITH ACCREDITED ENGINEERS, EXECUTIVES, AND ENTREPRENEURS

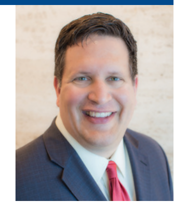
SARVER VROOMAN
WEALTH ADVISORS

9237 Ward Parkway, Suite 320 | Kansas City, MO 64114

Why Sarver Vrooman Wealth Advisors?



Peter Vrooman, CFA®, CIMA®, CRPC®
Partner, Wealth Advisor
Fundamental Choice Portfolio Manager
816-601-1152
peter.vrooman@svwealthadvisors.com



Jonathan Sarver, CPWA®
Partner, Wealth Advisor
Fundamental Choice Portfolio Manager
816-601-1151
jonathan.sarver@svwealthadvisors.com

Experience

Peter Vrooman, Partner, Wealth Advisor, and Jonathan Sarver, Partner, Wealth Advisor, have worked together helping affluent clients since 1999. They believe their emphasis on risk management strategies and retirement income investing has served clients well, navigating both bull markets and two bear markets (2000 to 2002 and 2007 to 2009). Peter and Jonathan are at the prime of their careers. Jessica Estes-Fleischmann has excelled as Operations Manager, handling all the trading, paperwork, distributions, and operations for the team for 9 years.

Credentials

Peter Vrooman has been in Financial Services since 1994. He graduated from the University of Chicago with a BA in Economics. He has achieved three designations: the Certified Investment Management Analyst® (CIMA®) designation, the Chartered Financial Analyst® (CFA®) designation and the Chartered Retirement Planning Counselor℠ (CRPC®) designation. Jonathan Sarver has over 20 years of Financial Services experience. Jonathan graduated from both Seton Hall University School of Law and Boston University. He graduated BU with *cum laude* honors. Jonathan recently authored a book entitled, *6 Essential Practices for Income Investors.* On October 30, 2017, Jonathan obtained the Certified Private Wealth Advisor® designation, administered by Investments & Wealth Institute and taught in conjunction with the University of Chicago Booth School of Business. The Certified Private Wealth Advisor® (CPWA®) certification is an advanced credential created specifically for wealth managers who work with high-net-worth clients. Jessica Estes-Fleischmann has been securities registered since 2004. She earned an MBA from Avila University.

References

A significant portion of Peter's and Jonathan's clients come from referrals from current clients. Often clients will bring friends, relatives, and co-workers to Peter's and Jonathan's wealth management seminars or client events. Many clients are engineers, corporate executives, or entrepreneurs who have been referred by other co-workers. Jonathan and Peter are proud of the fact that virtually 100% of their clients have deliberately chosen to work with Sarver Vrooman Wealth Advisors, rather than clients being acquired through acquisition upon another advisor's retirement or departure.