Kelly Richards - RG Capital

Putting the client first

How much will you need to save for retirement? Three million? Four? Five? Perhaps the bigger question is what is your vision for retirement? That is the primary focus of RG Capital, a fee-based boutique wealth management firm dedicated to methodical and meticulous planning which strives to help you achieve your ultimate goals in retirement.

For more than a decade, high net worth professionals and small business owners have relied on the RG Capital team to potentially reach greater wealth, create charitable legacies, and increase the possibility of financial security for children and grandchildren. This is accomplished, states President Kelly Richards, by utilizing RG Capital's proprietary planning software and investment models driven by a Chartered Financial Analyst ® and an investment committee. "Our team places morals and ethics first," Richards emphasizes.

When it comes to retirement planning, RG Capital charts a prudent, conservative course. "We're a firm that believes very strongly in not chasing returns," Richards states. "We are the tortoise and not the hare. When the 2008-2009 economic debacle happened, our clients, too, were affected, but in our opinion, nothing like their counterparts."

RG Capital helps pre-retirees calculate the investment commitment needed on a monthly basis in order to best possibly achieve their retirement goals. "Our new clients tell us they were told by an advisor that they need to save anywhere between three-to-five million dollars," Richards says. "But they have no idea how to get there. Our initial planning focuses on identifying their vision of retirement - whether they want to keep working in some capacity or stop work altogether. Following that we determine their ultimate wealth transfer goals. Once we determine where they want to be in retirement, we utilize our software and our specialized team to show them how they may be able to get there."

Consultation and customer service are the watchwords at RG Capital. "We are constantly in contact with our clients," Richards confirms. "Education is huge for us. We will do retirement plan reviews with our clients as often as quarterly for those who request it. We are transparent about our fees, which are included in every performance report."

The bottom line, Richards states, is: "Let us spend our time helping them realize their vision of retirement so they don't have to spend extra time away from their businesses or families."

A well-defined plan for the perfect retirement.

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