



Kelly Richards President

With a history of delivering results for industry leaders JPMorgan Chase and Bank One (NYSE: JPM, then the sixth largest bank in the United States), Kelly Richards brings almost a decade and a half of experience to RG Capital and RG clients.

Mr. Richards is known for growing portfolios and assets by leading gap analysis to identify client needs and matching them with industry trends and investment opportunities, while training others to do the same (leading teams overseeing \$50-150 million in assets). He has regularly been recognized for building client satisfaction through portfolio performance, responsiveness, and an unparalleled commitment to client communication, winning numerous awards and recognition in this area with every employer.

In the six years of being with RG Capital, Mr. Richards has played a key role in the organization's 30% growth, leveraging expertise in financial investment, asset management, and insurance strategies, as well as custom retirement plans (401k safe harbor matching with profit sharing and defined benefit plans) for key business clients.

A motivational speaker and trainer, Mr. Richards has developed and presented training, seminars, and financial education for Bank One, JPMorgan Chase, and now RG Capital. His previous experience includes consulting for a global communications corporation and sales management for a regional logistics and transportation company.

Mr. Richards studied business at Snow College in Utah. As a wealth management advisor, he is also a holder of Series 6, 7, 63, 65, and Arizona Life & Health Insurance licenses. A cancer survivor and active volunteer in the Phoenix community, Mr. Richards lives in Phoenix with his wife Miranda and their three children, Jackson, Grace, and Hudson.



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