

Main Office: 3520 Lincoln Ave Ste #1 Ogden, UT 84401

Satellite Office: By Appointment Only 14825 St. Mary's Lane Ste #250

Houston, TX 77079

Telephone: 801-627-1913
Toll Free: 877-627-1913
Fax: 801-627-2057
Email: info@kacfin.com

Website: www.kacfinancialservices.com

Office Hours: Mon-Fri 7:30 am - 4:00

pm MST

# We know you've worked hard for your money. . .

The investment climate today has never been more exciting or challenging. Individuals are living longer, retiring earlier, and wanting more money while Social Security and Medicare are stressed. That is why you need KAC Financial Services as your guide. Just as a compass guides each ship through its journey, we guide our clients through the ups and downs of investing throughout their life plan. We accomplish this through careful listening to your wants and then formulating an individual, comprehensive, and realistic plan to assist you in meeting your specific goals – whether it pertains to you, your family, your business, or an organization. As part of our holistic financial planning, we would like to work with your other trusted professionals such as CPA's, Estate Attorneys and Insurance professionals.

By keeping your objectives in focus, staying in contact with you throughout various market conditions, and making adjustments as economic or lifestyle conditions warrant, we maintain our commitment to "Guiding Your Financial Future".

# Now let us help your money work hard for you!



### Kim A. Checketts Founder/Owner

Throughout his career, Kim has specialized in meeting the unique financial goals, dreams, and objectives of the affluent and high net worth individuals as well as businesses.

His expertise includes separate managed accounts, insurance solutions and annuities, unit investment trusts, 1031 real estate exchanges, etc.



Darren B. Downs, CIMA® Vice President of Investments

Darren's primary roles are researching various investment options, conducting client reviews, and ensuring all of our client's individual needs are attended to.

Darren's expertise includes mutual funds, ETFs, and other investment vehicles as well as constructing individualized portfolios for our clients.



### Zachary Pinnau Registered Assistant

Zach assists in researching investments, running financial calculations, and preparing for client reviews. He brings operational and analytical experience to KAC Financial.

Zach graduated from Weber State University with a BA in Business Administration with an emphasis in Finance.



#### Melissa Thomas Administrative Assistant

Melissa is currently studying Computer Science at Weber State University, with a minor in Theatre and Physics.



Jessica Gailey Administrative Assistant

Jessica is continuing her education online through BYU-Idaho and is majoring in Applied Business with a minor in Marriage and Family.

At KAC Financial Services we always remember two things:

It's your money we are managing, not ours.

Without you we have no business.

## You can read more about us at kacfinancialservices.com