Complex Planning on Solid Ground

World Equity Group, Inc.

Navigating the winding road to and through retirement is hard enough without having to worry about where your advisor stands. Is this person committed to serving you, the client? Does he have any hidden agendas? Will she still be around in 10 or 15 years?

The three advisors at the helm of World Equity Group, Inc. — Richard S. Babjak, ChFc®, CLU®, CFS®, MBA, RFC; Todd Rollins, CFP®; and Dennis P. Ryan, JD, MBA — understand how important it is to leery pre-retirees and retirees that their advisors be independent and firmly planted. Indeed, Babjak, Rollins and Ryan relish their own independence and stability for the freedom, flexibility and enduring client relationships they afford.

"We have no proprietary products, and we don't benefit from choosing one product over another," Babjak says. "We can find whatever we need in the marketplace and position clients where they'll be treated best. Their goals and risk preferences determine how we proceed."

"At many large wire houses, where high turnover is a fact of life, investors don't feel they're getting the advice they need," Rollins says. "We offer a consistent approach over time. We are that steady partner, that 'family CFO,' our clients know they can trust."

Sharing Insights, Empowering Investors

Babjak, Rollins and Ryan are avid educators, leading public seminars on college campuses about the many considerations and potential pitfalls of retirement planning and investing. The World Equity Group team is also committed to keeping clients informed — via monthly newsletters, quarterly reports, educational events and yearly account reviews — so they can make solid financial decisions.

From left: Dennis Ryan, Terry Kania, Richard Babjak, Todd Rollins

"All our discussions center on three components: long-term financial planning, risk management strategies and retirement income strategies," Ryan says. "We've invited speakers to address clients' concerns outside the financial realm as well. We go beyond the numbers on the page, adding value wherever we can."

Big-Picture View, Long-Term Focus

While the vast majority of World Equity Group's clients are nearing or in retirement, most of its leadership team isn't even close. Rollins and Ryan, whose experience and credentials rival those of many older advisors, have decades of service ahead of them. Together with Babjak, they bring to the table a wealth of hard-earned knowledge — business administration, portfolio design, corporate and estate law, life insurance and more — much to their clients' advantage.

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> – Dennis P. Ryan

"We're involved in every aspect of our clients' financial lives, not just those we administer on a daily basis," Rollins says. "Whether they're considering refinancing a home or need a referral for a good CPA or attorney, they call us. One of us is always here with answers and advice."

"For us, helping clients pursue lifelong goals is an ongoing process," Ryan adds. "And we intend to continue that process, as dedicated partners, well down the road."

WORLD EQUITY GROUP

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