> partner spotlight

# Brett Reid GROUP





By Dave Danielson • Photos by A Perfect Spot For You LLC

When you assist your clients in putting a plan in place to reach their real estate goals, their chances of hitting those marks increase substantially.

The same holds true for you. Sometimes, in the process of helping your clients and working through the churn of life and business, it can be easy to put off those important steps to achieving success in your own future ... with a strategy that can lead you to a solid and successful retirement.

That's where you can count on the experience and expertise of co-owners and financial planners Tim Underwood and Chris Wadington at Brett Reid Group.

The passion for what they do to support area REALTORS® as they plan for future success in their lives is something that drives both.

"I really enjoy being able to work with such a wide variety of people and situations — and finding solutions that help them to be successful in their finances," Tim emphasizes.

"As part of that, it means a lot to us to have people feel more at ease with any of the things we just talked about with them," Chris points out.

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Those who work with Tim and Chris have access to their expertise and a wide range of high-quality strategies that can, in turn, change the trajectory of their lives.

Tim and Chris offer registered investment advisor services through Brett Reid Wealth and are certified by the Profit First Professionals to represent the Profit First program.

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## **Building with Their Best**

The pair prize the relationships they build and strengthen each day with their real estate partners.



"About 80 percent of our client base is real estate agents," Tim explains. "The focus of the company is to work with REALTORS®. We help them learn how to retire and understand if their profitability from their work is enough to fund that retirement."

Chris and Tim cherish their roles as financial advisors.

"We have done a significant amount of financial planning and classes at a lot of brokerages here in Kansas City. Many agents were taking in a lot of money, but they didn't have a lot left at the end and were struggling to pay taxes and bills," Chris says. "That's when Profit First came along and closed the loop with the whole picture. It helps them put all their finances in place to take care of those issues on the front end."

# Thoughtful and Valuable Approach

Those who open themselves to the expertise and strategies that Tim and Chris employ appreciate the thoughtful and valuable experience they receive in the process.

"There can be a misconception where sometimes people think that our services are going to cost them money upfront. But, we offer a free one-hour consultation and get back to them with recommendations they can decide on," Tim says. "Some people are afraid of talking because they are afraid they are going to have to pay. We invest that time with people up front, and then they can decide what they want to pursue."

Tim and Chris also conduct a good amount of educational programming for area real estate agents.

"In the last year, we've had more than 400 agents go through our financial education programs. We see ourselves as educators, and then from there, we talk with them about how we can help them," Tim points out. "They have a better frame of reference from going through those educational courses. That's rewarding for us because we are there to help them understand. We aren't just there to sell them."

### **Positive and Streamlined**

Providing a streamlined, positive experience is at the heart of the drive for the team.

"Most people have a misunderstanding about sitting down with a financial planner. We have a lot of people who say, 'Wow, that was easy,'" Chris explains. "We simplify the process and make it as easy as possible for them to get what they need as quickly and as easily as possible. It has been very rewarding on that side. We're here for everybody."

When you're looking for a partner who is there to provide you with life-changing strategies for your financial future, look to Tim, Chris and the Brett Reid Group.

Contact Chris and Tim at Brett Reid Group Today! www.brettreidgroup.com

### Chris:

Chris@BrettReidGroup.com 913-745-7777

### Tim:

Tim@BrettReidGroup.com 913-530-2951

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