



# News from The GenWealth Group



## Your Remarkable Lives

In the summer of 2021, we launched a new marketing campaign to tell the story of our clients' **Remarkable Lives**.

Captured during seven unique photoshoots, we took images of what truly moves you. From hiking, to boating, gardening, music, photography and beyond, we learned how remarkable your passions are.

We feel that the good work done at **The GenWealth Group** helps allow you time for what you enjoy. We'll be sharing your stories in upcoming issues of this newsletter.

You can **see all of the amazing images** on our NEW website: <https://thegenwealthgroup.com/>  
I hope you love them as much as I do!

~Cherie

## Attract and Retain in 2022

After spending the last two years dealing with the tumult of Covid, we've again turned our attention to growing our team and hiring our 8th financial professional. It's clear that the workforce has changed dramatically and attracting and retaining the next generation of employees has been a large part of my focus lately.

The current generation is looking for more flexibility, more work-life balance, more income and are less ready to commit. This poses a challenge when integrating a new hire into our firm. As you all know, our current team is beyond loyal, deeply committed to our clients (and our firm) and have worked to establish their technical expertise over decades. Constant innovation (like it or not) is how we continue to grow and thrive.

With that, we are proud to launch new benefits for our current team at The GenWealth Group.

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# Meet Tom and Gina



Tom and Gina share a love of visual arts and created Brooklyn Travels™ to showcase their work.

Tom traveled the world as a cameraman at CBS News and now creates his own worlds in virtual reality.

In her career, Gina encouraged creative outlets as a school Social Worker.

Today she finds time for her own creative talent as a photographer and singer/song writer.

## Men's Night Out



March Madness refers to that time of year when the National Collegiate Athletic Association (NCAA) basketball tournaments are held. It also refers to another type of madness called **Men's Night Out**. This special event has our clients gather at Keens (a NYC steakhouse that dates back to the 1800s) and then to Madison Square Garden to watch the games and root for their teams. Of course, it's a very special night if Mike gets to see his beloved Seton Hall Pirates on the court (which he did this year!) Thanks to all for joining us....and **Ladies Night Out** is in the works for the Spring.



# Team Profile: Kevin Worley, CFP®

In November, 2019, our office manager, Kristen Blair introduced us to Kevin. She had met him at a neighborhood party and thought, “Hey, this guy would be a great addition to our team at The GenWealth Group!”.

After a long career on Broadway, Kevin was ready for a change. In the “wings” he was studying for his CERTIFIED FINANCIAL PLANNER™ designation (CFP®) and planning his next act in finance.

Over the last two years, Kevin has established himself as a trusted Wealth Planner at The GenWealth Group. He partners with our advisors to prepare analysis for your Financial Planning Review meetings and retirement projections.

He works with you to ensure seamless integration of all financial matters and counsels on important benefits including Medicare and Social Security. With special training as a National Social Security Advisor (NSSA®), Kevin helps ensure you maximize enrollment in these important programs.

He is also our insurance expert, advising on health, life, disability, and long-term care insurance.

Kevin has deep ties to the Broadway community and we now gratefully advise his many friends and colleagues who are superstars on the Broadway stage and behind the scenes.

Away from work, Kevin is a dedicated father of two high-energy boys and celebrating his 10th wedding anniversary to his lovely wife, Denise.

Kevin grew up in Iowa and holds a Bachelor of Fine Arts degree in Musical Theater from Webster University in St. Louis.

**Favorite Food:** Homemade pasta and meatballs

**Favorite Books:** *In the Heart of the Sea* by Nathaniel Philbrick and *Guns, Germs, and Steel* by Jared Diamond



## Windows for Women



During the month of March, The Maplewood Village Alliance showcased the work of women artists and collaborated with women-owned businesses (like **The GenWealth Group**) to serve as venues for display. We're honored to showcase the work of Barbara M. Bickart <https://www.facebook.com/BarbaraMBickart>

in our front window this month.



# Attract and Retain

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I believe that as clients, you will appreciate the impact these benefits will have on retaining our valued team and the impact it can have on the service you receive.

**Work-Life Flexibility: “62 For You”:** We now offer 62 (partial or full days annually) that our team can take off from work. This includes at least 20 paid days off, plus 10 bank holidays when markets are closed. We also offer “Happy Halves” where we can take a 1/2 day (up to 8 times a year) and leave early or come in late. Our employees also get their birthday off, monthly flex time and another Day of Giving to volunteer for a cause of their choosing.

Working from home (maybe in pajamas) is now the norm, and some financial institutions continue to offer it, at least partially. It’s not our culture at The GenWealth Group. With our consistent focus on the client experience, we need “boots on the ground” ready to greet you in our office and doing the work it takes to manage meaningful relationships and careers.

We believe “62 For You” is something better than “work from home”. We think it creates a workplace where we can have personal flexibility and still perform professionally as a team with true collaboration.

**MVP 360:** Also new this year is the “MVP 360” Award. This bonus award (given as a share of the firm’s profits) encourages each employee to “think like an owner”. The MVP 360 award is designed so that top-ranked employees get the largest share of the bonus pool. Using an anonymous survey, we’ll rank each other’s performance. Owners will be included in the survey too. Awarded annually, the MVP 360 bonus is given as deferred compensation to encourage employee retention.

**Path to Partnership:** Recognizing the importance of succession and cultivating leaders, Cherie and I have decided to offer select advisors a “path to partnership”. Top performing advisors will have the opportunity to buy a minority ownership stake in the firm. This is a true partnership offering and comes with all the advantages (as well as complications) of ownership. This was a tough decision for us, as we are sharing “our baby”. We did extensive research prior to arriving at this decision. While we don’t want to own the largest RIA firm, we do want to own the best RIA firm. We realize that growing our high performing team will help us get there. We are well into our second decade (almost 15 years old) and we are building a platform that can carry us for decades more. We thank each of you for being an integral part of the journey.

~Mike



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