REGAL
FINANCIAL GROUP
GROSSE ILE

Kevin Berwald, CLU®, ChFC®, CFP®, CASL®

Founder, CEO, Berwald Financial Enterprises, LLC

Home Office: 17601 Parke Lane | Grosse Ile, MI 48138
Business Office: 2867 44th Street SE | Kentwood, MI 49512

734.626.1281 | kberwald@regalfin.com | Regal-LionShare.com

"It is literally true that you can succeed best and quickest by helping others to succeed." – Napoleon Hill

Kevin Berwald, CFP® began serving clients in the financial services industry over three decades ago after graduating from college receiving a BA in business with a marketing concentration. Over that time his focus has been centered on creating processes to help individuals, families and businesses establish and plan to achieve their personal and financial goals. Since obtaining his CFP® designation in 1997 and as a Certified Financial Planner Professional, Kevin follows a seven step process to help you make a plan designed to reach your goals, guide you through it and then review your progress over time. Kevin, his wife Heather, and two sons live in Grosse Ile, Michigan where they enjoy boating and fishing on the Detroit River and Lake Erie, playing golf and swimming as members of GIGCC, hunting and raising honey bees on their farm and are members of Church of The Way. Kevin attended Olivet University where he received four varsity wrestling awards and was co-captain his senior year.

Anchored by the core tenet that "the quickest road to success is helping others to succeed", Kevin best serves clients that:

- Need help in creating or revising a plan to achieve specific financial goals like income, retirement or specific needs planning.
- Are concerned that their current retirement income levels may not be sufficient to last a lifetime or are not keeping pace with inflation.
- Need help to transition from accumulation of wealth to taking income from their investments. This might be by choice, forced retirement, divorce or death of a family member.
- Are charitably inclined and would like to create a plan to enrich their favorite beneficiaries and charities.
- Would like to review their existing 401k, work retirement plans, life insurance policies or annuity contracts; specifically for appropriate ownership and beneficiary reviews.

Many of Kevin's best client relationships have been related to:

- Individuals and families that desire control over their wealth and recognize money as a tool to achieve goals.
- Individuals and business owners seeking to update their financial and marketing plans.
- Friends and family members and their referrals of others that they care for.
- Those that live by The Golden Rule and treat others the way they want to be treated.

Feel free to contact me for a no-cost review of your current financial plans and an evaluation of whether the amount of risk you are exposed to today is appropriate for your current planning and risk tolerance.

Phone: **734.626.1281** or send an email with any specific needs or questions to **kberwald@regalfin.com**.