Mark B. Grooters

Financial Advisor

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"Whether you think you can, or you think you can't – you're right." - Henry Ford

Mark Grooters began serving clients in the financial services industry in 2012 as he recognized a need for investors to have more access to honest and ethical financial advisors. Over that time, he has developed the philosophy that his clients should like, know, and trust him as both a financial advisor and friend. This philosophy has evolved into a full services financial planning practice where the emphasis is to offer clients comfort and peace of mind that comes with solid financial advice and proper planning allowing them to sleep well at night. To achieve these objectives, Mark follows a multi-step process to help you design plans tailored specifically to your goals. This includes an implementation plan as well as regular reviews to help keep you stay on track as your life evolves.

Mark lives on the NW side of Grand Rapids with his dog, and best friend, Ron. Mark loves sports of all types, both playing and spectating. While golf is his favorite hobby, he also enjoys participating in league play for a wide range of sports including softball, volleyball, corn hole, basketball, bowling, and billiards. Mark is also an active member of Grace Life Bible Church where he serves as an elder on the board.

Anchored by the core tenant that people should have the financial peace of mind to sleep well at night, Mark best serves clients that:

- Have reached a point in their financial life where they need to get organized, get more clarity of their financial future, and better prepare to achieve their financial goals.
- Have grown their assets to a point that they may need to develop, or update, an estate plan to ensure the efficient transfer of wealth to their beneficiaries.
- Are business owners that have a need to create or update their business succession plans.
- Have an interest in creating a charitable plan to support the institutions and causes that align with their values.

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

- The mass affluent and diligent blue collar workers that are often not being well supported by the financial industry.
- More established and mature business owners that are thinking of creating a succession plan that includes the sale of their businesses.
- Senior citizens that are charitably inclined and are obligated to take required minimum distributions, that they often do not need, from their retirement accounts.
- Friends, family members, and referrals of others they care for.

Feel free to contact Mark to schedule a no obligation meeting to see how he can help you get better organized to reach your financial goals.

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