Smart Planning Made Personal

Adams, Gut & Associates combines intelligent financial planning with genuine care to help clients live better.

For the experienced advisors at Adams, Gut & Associates, building a financial plan is like putting together a puzzle. Sometimes knowing how all the pieces fit together takes help.

"Most people have puzzle pieces in their box—IRAs, 401(k)s, wills—but they don't have a plan that connects their puzzle with what's in their heart," says John Adams, CLU®, ChFC®, CASL®, RICP®, CFP®, private wealth advisor. "We help our clients put all their pieces together into a plan that helps to support their vision, values, and goals."

With over 30 years of experience, Adams knows financial planning is about more than simply putting together a plan. "Clients want a long-term relationship for themselves and their heirs, not a transaction," he says.

"We spend time getting to know who our clients are, what they care about, where they've been, and where they want to go," says Dan Gut, CLU®, CFP®, private wealth advisor. "In that process, we build trust and relationships." Doing so puts clients at the center of a dedicated team of advisors focused on comprehensive financial planning and wealth management.

At the core, this approach involves integrating all the components of their clients' financial lives together, from insurance planning to investment management and even coordination with clients' banking, accounting, and legal advisors, "so everyone's playing the same note when it comes to their planning," Adams says.

For Generations to Come

By focusing not only on investments, integrated planning achieves growth through a combination of diverse financial tools. But smart planning is just one component that makes Adams, Gut & Associates stand out. The firm is deeply dedicated to serving clients and their families with continuity for generations to come.

"Dan and I are committed to building a 100-year-old firm. We don't just help clients build their plan. We'll be here to help them execute it," says Adams.

"Our goal was to create a firm that isn't dependent on one person," Gut adds. "Many advisors in the industry are solo practitioners. We're a team with multiple advisors."

Adams and Gut say continuing education and development are key. "We encourage our associates' growth because it benefits them and benefits our clients," says Gut.

Investing in education is a priority that extends beyond the firm's walls through a University of Akron scholarship program designed to support the next generation of financial planners. A helping hand can be uncommon in the financial industry, but Adams and Gut understand tough times are when people need help most. "Sometimes we meet clients during a time of need," says Gut. "We take time to educate them about their needs, organize their finances, and develop a plan to manage their situation."

No matter where clients are on their financial journey, they know they'll be cared for at Adams, Gut & Associates for a lifetime. "We love helping to give clients the clarity and confidence to enjoy life with peace of mind," says Adams. "We're here to help them spend life living."

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