



**Renaissance  
Financial**

# Renaissance Financial

Using creative business and personal planning,  
we help our clients achieve financial freedom...  
one relationship at a time.

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**INVESTMENTS • PLANNING • INSURANCE**

## The Renaissance Way

At Renaissance Financial, we blend creativity, team collaboration, and decades of experience to design solutions that help protect, grow, and preserve what matters most to you. Through personalized strategies and meaningful relationships, we provide wealth management, estate planning, and tax-efficient solutions tailored to your evolving goals. Our commitment is to deliver an unmatched experience, helping you achieve financial freedom—one relationship at a time.

We believe that our dedication to helping clients achieve financial freedom is inseparable from our commitment to the community within and outside of the firm.



## Comprehensive Services Backed by Strategic Planning



### Individual + Family

#### Financial Planning

- Investment Planning
  - Mutual Funds, Stocks, Bonds
  - Fee-Based Portfolio Management
  - College Funding
  - Cash Management
- Insurance Planning
  - Life Insurance
  - Disability Insurance
  - Long-Term Care Insurance
- Retirement Planning
  - Social Security, Pension Plan, 401(k) or 403(b), IRAs, Roth IRAs
  - Personal Savings, Investments, Annuities, Life Insurance
- Advanced Strategy Planning
  - Estate Planning Strategies
  - Charitable Giving Strategies
  - Tax Reduction Strategies
  - \*Fee-based Financial Planning



### Business

- Key Person Insurance
- Buy/Sell Funding and Strategies
- Succession Solutions
- Retirement Plan Strategies
- IRAs, Simple IRAs, Roth IRAs, SEPs, KEOGHs, & 401(k)s
- Group Benefits: Life, Health, & Disability Insurance
- Executive Compensation Programs
  - Executive Bonus Arrangements
  - Deferred Compensation
  - Defined Benefit Plans
  - Cash Balance Plans
  - Profit Sharing
- Financial Education Seminars





## Individual Services

Your needs change throughout the stages of life. We, as a team, will work with you to make sure you have the right strategy in place now and in the future.

### A financial strategy as unique as you

Each stage of life comes with unique hopes and concerns, which is why we start by evaluating your current financial picture. We'll help build a personal safety net, lower your tax burden, reduce debt, and strategize for efficient asset transfer to the next generation. If charitable causes are important to you, we'll incorporate that into your plan. Together, we'll create an investment strategy to support both your present lifestyle and future goals.

### Life is constantly changing - your financial plan should accommodate

The only constant in life is change; therefore, your financial plan should be flexible enough to respond to the unexpected yet disciplined enough to achieve your goals. We will work collaboratively with you to develop a personalized plan and assist you in:

- **Connecting** your dreams to specific goals and financial targets
- **Balancing** risks and returns to customize a financial plan that reflects your unique situation
- **Navigating** complex financial markets, tax laws and investment opportunities
- **Protecting** your legacy with individually designed trust strategies
- **Partnering** with accountants, attorneys, and other advisors to help ensure you're making informed decisions and following the correct advice

### As an independent firm, our priority is always you

Renaissance Financial is an independent fiduciary financial firm which means we are not under any parent company's obligation to work with their particular offerings.

## Investment Advisory Services

When you invest with Renaissance Financial's Investment Advisory Services, you get a hands-on team of highly experienced investment professionals who are equipped to help you get the most from your money. We work with you to create a roadmap for your financial portfolio based on your unique investment objectives, liquidity needs, tolerance of risk, and time horizon.



## Business Services



Businesses of all shapes and sizes need a strong support structure to grow. At Renaissance Financial, we have the tools and experience to create strategies that are uniquely suited to each business and aimed at promoting their growth. We are committed to helping you reach your business goals and ensuring that your employees are thoughtfully considered.

From tax-advantaged investment strategies and business transition services for you to 401(k) and executive benefit plans for your employees, we offer a wide range of products and services to help your business maximize its financial and operating potential.

### The Extra Mile: The relationships we build along the way

We specialize in supporting businesses in growing and attracting the right team members. By analyzing your current group benefits and retirement services, our team can develop or enhance your employee benefits package to further support employee retention and recruitment.

Our dedicated **Advanced Planning Services** specializes in designing executive compensation programs tailored to attract, retain, and reward top leadership talent, ensuring your organization remains competitive and poised for success.

Choosing, customizing and implementing a benefit or retirement program can be particularly complex. Let our **Retirement Plan Services** go to work for you so you can focus on what you do best – run your business!



## Let's Get Started

By prioritizing your financial independence and remaining focused on realizing your ideal life, you can move forward with greater confidence. We are dedicated to supporting your growth both now and for the long term.

We have the freedom to choose financial and investment products that benefit our clients' goals. Using creative strategies, we are at liberty to design unique solutions that are most effective and responsive to your changing needs. No matter how we grow as a firm, our independence enables us to stay focused on the priorities of those we serve, our valued clients.

## Retirement Plan Services



Our Retirement team is dedicated to working alongside our advisors to help guide you or your employees towards the ideal retirement lifestyle. We are committed to effectively designing plans that meet unique needs, every step of the way.



St. Louis, MO | Omaha, NE  
Lincoln, NE | Overland Park, KS  
Phoenix, AZ | Salt Lake City, UT

**Proudly serving clients in all  
50 states**



**Renaissance  
Financial**

Contact@rfc.com

Phone: 1-800-440-5039

Fax: 1-877-413-8296

**www.rfc.com**



## Do you have a plan?

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For such a simple question, the act of creating a financial plan is a complex one. At Renaissance Financial, we simplify the process. We listen and learn about your current financial situation, future goals and long-term aspirations and tailor a strategy that is uniquely suited to you.

We employ a robust financial team from all disciplines that work together to provide recommendations designed to guide you on your financial journey. We will help you develop a strategy that makes the question, "Do you have a plan?", a simple one.

Our goal is to ensure you are on the best path to meeting your financial objectives - whether it be for yourself, your family or your business. We have long-standing professional relationships with substantial and well-established financial institutions allowing us the ability to provide you with a broad range of financial products and services.

We have vetted and selected financial services and products that our financial team can customize to your needs. Through focused attention, personalized service and flexibility at every turn, we will deliver a comprehensive financial package with your specific needs in mind.



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Phone: 1-800-440-5039 | Fax: 1-877-413-8296 | [Contact@rfc.com](mailto:Contact@rfc.com)

St. Louis, MO | Omaha, NE | Lincoln, NE | Overland Park, KS | Phoenix, AZ | Salt Lake City, UT

[www.rfc.com](http://www.rfc.com)

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