

Financial Planning to Keep You on Track

At Stock Yards Bank Wealth Management & Trust, we believe your financial path should be as unique as the life you've built. We move past "one-size-fits-all" formulas to create a personalized, holistic plan that feels just right for you. By weaving together every piece of your financial picture, we help protect your world today—and ensure you're set for a stable, joyful retirement tomorrow.

Designing Your Master Plan

Think of us as your financial partners. Together, we'll take a warm and thorough look at:

- **Your Dreams & Realities:** Assessing current goals and obligations.
- **The Big Picture:** Asset allocation and retirement planning.
- **Future Income:** Social Security and retirement income analysis.
- **Life's Milestones:** Education planning and stock option analysis.
- **Your Legacy:** Business succession and estate planning.
- **Safety Nets:** Risk management (Long-Term Care, Life, and Disability Insurance).

Our Collaborative Process

We follow a disciplined - yet gentle - process to help you reach your goals with confidence:

Listen: We start by getting to know your unique goals and needs.
Analyze: We take a thoughtful look at your current financial health.
Create: We develop and help you implement a plan tailored to you.
Care: We stay by your side, monitoring & adjusting your plan as life changes.

Why Start Today?

Financial planning is about more than just numbers; it's about peace of mind. Our clients enjoy:

- A higher probability of reaching their "happily ever after."
- A clear, structured approach that simplifies the complex.
- An objective, caring perspective to keep things in balance.
- The confidence of knowing you are exactly where you need to be.

Ready to Breathe a Little Easier?

We'd love to chat. Schedule a complimentary consultation today at the location nearest you:

Louisville/Southern Indiana: (502) 625-1005
Indianapolis: (317) 238-2844
Cincinnati: (513) 824-6117
Central/Eastern Kentucky: (859) 765-8242

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