

Sarver Vrooman Wealth Advisors Renews and Customizes Independence with First Clearing and TradePMR RIA Platform.

Kansas City, MO – February 14th, 2025 – Sarver Vrooman Wealth Advisors, a \$430 Million boutique, independent wealth advisory firm specializing in serving accredited investors—primarily engineers, executives, and entrepreneurs—has announced the launch of its Registered Investment Advisor (RIA) practice. This milestone, celebrated on Valentine’s Day, marks a renewed commitment to holistic wealth management and client education.

The Team has partnered with First Clearing and TradePMR to enhance their independence and provide customized technology, a wide array of investment strategies, and fiduciary services.

Managing Partner Peter Vrooman stated, “We are customizing and upgrading our independent practice to better serve the needs of our niche clients.”

Team Credentials and Experience

The Sarver Vrooman Wealth Advisors’ Team is composed of the following individuals:

Jonathan Sarver, CPWA®, JD:

Managing Partner -- Wealth Advisor, Senior Portfolio Manager, Director of Client Education and Experience

Author of *6 Essential Practices for Income Investors*. Graduated Boston University cum laude and Seton Hall University School of Law

Peter, Vrooman, CFA®, CAIA®, CRPC®, CIMA®:

Managing Partner -- Wealth Advisor, Senior Portfolio Manager, Chief Investment Officer

Graduated University of Chicago with a degree in economics

Thomas King, MSF:

Partner – Wealth Advisor, Portfolio Manager, Director of Alternative Investments

Equity Partner with extensive private equity experience and a Master of Science in Finance from the University of Miami

Ron Dietz, CPWA®, CIMA®, CMFS:

Partner – Wealth Advisor, Portfolio Manager, Director of Risk Management

Equity Partner with 17 years of experience in convertibles, alternatives, and growth equities

Jessica Estes, MBA:

Chief Operating Officer and Chief Compliance Officer

18 years of experience with the Team and has an MBA from Avila University

Kat Aguilar:

Operations Specialist

Advantages of the RIA Model

The Firm highlights four key benefits of its transition:

1. Technology: A customizable tech stack for enhanced financial planning and client service.
2. Investments & Research: Access to strategies and research beyond proprietary sources.
3. Holistic Services: Collaboration with external professionals like attorneys, accountants and mortgage advisors for comprehensive client support.
4. Fee-Only Fiduciary Model: Helping to eliminate conflicts of interest to prioritize client needs.

The Team's dedication to advanced education has earned them recognition on the Forbes list five times, including three as a team, with accolades in both Kansas and Missouri.

For more information about Sarver Vrooman Wealth Advisors' services or their new RIA platform, visit www.svwealthadvisors.com.

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All investing involves risk including loss of principal. Past performance does not guarantee future results.