Rick Kelley, AWM

First Vice President - Financial Advisor

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Value Statement

Rick helps create financial security and peace of mind for individuals and their families, employers and non-profit organizations. With the help of a dedicated team, he accomplishes this by providing his clients with a high level of service that meets and exceeds their expectations. Investors benefit from a customized approach to managing their wealth because it helps address their current financial needs and achieve their long-term goals. Rick believes in long-term investment strategies and a widely diversified model to help his clients reach their objectives.

Approach to Wealth Management

As an Accredited Wealth Manager (AWM), Rick facilitates the majority of the teams mutual fund and managed products analysis. Financial Advisors who successfully complete their AWM training have an advanced knowledge of key wealth management strategies that may be important to high net worth clients, including investments, retirement planning, insurance, charitable giving, estate planning and business succession solutions.

Rick's wealth management approach integrates your objectives into a personalized plan that can be updated as life changes occur. He combines sophisticated planning tools with professional resources to help match your objectives with customized solutions. Rick's wealth management services include:

- Asset allocation
- Individual portfolio construction
- Retirement income planning
- Multi-generational, tax efficient strategies
- Managing concentrated stock positions
- Long-term and life insurance planning
- Credit and lending

RBC Wealth Management,
a division of RBC Capital Markets, LLC.,
Member NYSE/FINRA/SIPC.

Wealth Management

18453 (2017-10-18)

Qualifications

Rick joined The Kelley Team in 2007 and brings nearly 20 years of consultative solution selling from both consumer related and business driven industries. This broad exposure provides him great insight and connection to many of the challenges facing clients and families as well as businesses/employers.

Rick holds the Series 7 and 66 FINRA registrations in addition to his life and health insurance licenses. He earned the Accredited Wealth Manager (AWM) designation in 2010.

Personal

Rick resides in Omaha and enjoys spending time with his wife and two children. Oustide of work, he loves to golf, travel and actively coaches his son's athletic teams. Rick is a graduate of the University of Kansas and is an avid Jayhawk supporter. He believes in giving back to his community and was an active board member with the Omaha Children's Hospital and Medical Center Foundation. He is currently on the Westside Community Schools Foundation Board. Rick is also a past board member of the Kiwanis Club of Greater Omaha.