

# Count On It

With nearly 40 years to its name, wealth management firm **Bill Few Associates** continues to build its legacy of smart investment planning for families and individuals.



**T**here comes a time when a person considers the age of their primary care physician, dentist, or therapist and wonders what will happen should that service provider retire before them. The same question applies to financial advisors: What if they retire before their clients? Who will look after their clients' money?

Bill Few Associates has thought long and hard about this question, and its team has structured the company in a way that alleviates worries their clients might have about succession. With offices conveniently located in the North Hills and South Hills of the Pittsburgh suburbs, the firm is poised to work with generations of clients as it passes leadership through the ranks.

"We intentionally match our senior advisors with advisors 20 and 30 years younger than them," says Mike Kauffelt, the firm's co-chief investment officer. "That way, we make sure anyone who comes to us, at any time in their life, can count on working with an advisor well into retirement."

## Going the Distance

Years ago, the firm's founder, Bill Few, made a decision that impacted the company's trajectory. Rather than sell or merge with an outside organization, he sold the firm

**BACK, FROM LEFT TO RIGHT:** Peter Belcastro, CFP®; John Nichols, CFP®; Brian Jourdan, CFP®; and Kevin Corbett. **FRONT, FROM LEFT TO RIGHT:** Emily Marzina, CFP®; Rodney Engh, CFP®; and Mia Kovacs, CFP®.

to a group of his own advisors. They then sold it via an employee stock option plan. Today, Bill Few Associates is owned by its 39 employees, who have a vested interest in keeping it intact for decades. For clients of Bill Few Associates, the arrangement demonstrates that the firm—which has successfully transitioned through the decades—has no plans of changing ownership, name, or city.

Complementing this long-term outlook is the firm's internal structure. Its seven teams include advisors staggered across generations, ensuring that every client works with experts who can usher them to retirement, as well as others who can see them through it. And while senior advisors bring decades of experience and robust professional networks, younger advisors offer the continuum of long-term guidance as well as fresh generational perspectives and insights regarding trends in the investment world.

When working with Bill Few Associates, clients receive a singular investment plan that's flexible and responsive to whatever changes life throws their way. This is not a set-it-and-forget-it plan,

nor a one-size-fits-all plan, but rather a customized plan adjusted over time with regard to taxes, life insurance, wills, estate planning, and client-specific goals. The firm doesn't work with institutions or charitable funds—primarily just individuals and families looking to be actively involved in all aspects of their financial health.

"We get entire families involved in meetings so that everyone is aware of the plan for transitions of generational wealth," Kauffelt says. "Our guiding principle has always been that our clients' best interest is our best interest."

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