

NEWS



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Mattern Wealth Management to Deliver Personalized, Fee-Only Financial Services as SEC Registered Investment Advisor

Veteran advisor David Mattern leads new Kansas-based firm with focus on clients first, delivering clear, comprehensive knowledge.

Lawrence, Kansas [November 6, 2019] – David Mattern today announced the launch of [Mattern Wealth Management, LLC](#), a fee-only, registered investment advisory firm based in Lawrence, Kansas. Mattern, previously practicing at Wells Fargo Advisors, brings more than 25 years experience. He is joined by Kyle Cross, CFP® and Marcus Mattern, both financial advisors.

“We have always believed in the fiduciary standard of care,” said Mattern. “It is what clients have always expected and what we have strived to provide. It was clear to us that becoming a fee-only Registered Investment Advisor, working only for the client, was the next logical step. Our main priority is our clients’ wellbeing. It is the foundation for our work and the reason for our new tag line – ‘Clients first. Always.’”

Prior to forming Mattern Wealth Management, LLC, Mattern and his team were with Wells Fargo Advisors (WFA) and other predecessor firms. Mattern had been Managing Director – Branch Manager and Senior Private Investment Management Portfolio Manager with WFA. He has also been an instructor of Continuing Professional Education for CPAs, applying his well-established financial knowledge to a range of planning and investment topics.

EXPANDED ACCESS, SEAMLESS TRANSITION

With the new independent structure, Mattern Wealth Management clients will have expanded access to investment solutions. The firm will be adopting the latest technology to facilitate ready insight into their clients’ investments and overall financial well-being.

Mattern Wealth Management is engaging TradePMR for technology and custodial support based on the firm's twenty-year track record of serving thousands of advisors. "TradePMR's award-winning software, ability to integrate with other providers and high advisor satisfaction ratings are reassuring," said Mattern.

First Clearing, a trade name used by Wells Fargo Clearing Service, LLC, a member of SIPC, a registered broker/dealer and non-bank affiliate of Wells Fargo & Company, will provide securities execution and brokerage clearance services.

"Clients were able to seamlessly transition to our new independent firm with only a few signatures. Account numbers and standing instructions stayed intact, and they remained fully invested," continued Mattern. "Earlier this year, TradePMR and First Clearing announced a streamlined transition process for financial advisors looking to establish their own independent practice. We are thrilled to be able to offer this seamless process to our clients."

LAWRENCE KANSAS BASE

A long-time resident and active community member of Lawrence, Mattern has served on the Board of Directors of the St. Lawrence Foundation and the Vantage Pointe Foundation as well as the Corpus Christi Financial Council.

Mattern Wealth Management, in a new office suite in the same building as their previous office, is located at 1811 Wakarusa Drive, Suite 103, Lawrence, Kansas. Investors interested in scheduling a consultation can call (785) 842-7680 or email info@MatternWealth.com.

ABOUT MATTERN WEALTH MANAGEMENT, LLC

Mattern Wealth Management, LLC, was founded in October 2019 as an SEC Registered Investment Advisor and financial planning firm. Led by veteran financial advisor David Mattern, the firm will continue to build its reputation on integrity, trust and accountability. Mattern Wealth works with individuals and families, helping them plan for their financial and retirement needs. For more information, visit the firm's brand new website: www.MatternWealth.com.

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