

## Personal CFOs for **SUCCESSFUL FAMILIES**

With nearly 150 years of history and over \$13 billion in assets under management, Moneta Group is ranked the fourth largest RIA firm in the country\*. But only one client matters: *you*.



Tom O'Meara, MBA, AIF®, and Gene Diederich, CFP®, CPA

**“W**e do everything for successful families that a CFO would do for a successful company,” explains CEO Gene Diederich. “We offer income tax planning, estate planning, insurance planning, risk management, retirement planning—a wide variety of services to help clients sleep better at night.”

With a deep bench that includes investment strategists, insurance experts, tax analysts, and estate planning attorneys, the team is described by Chairman Tom O'Meara as a “financial think tank” that strategizes on behalf of every client.

“We become a trusted part of clients’ multigenerational families,”

says O'Meara, who keeps a whimsical “that was easy” button on his desk to set the tone for client meetings.

“Our goal is to give clients financial freedom and peace of mind.”

### **High Net Worth Needs**

Before a single asset comes under management, Moneta Group first meets with new clients to understand their unique needs, goals, and financial history. Great strides are taken to encourage honesty and full disclosure from clients, which can lead to the discovery of complex financial challenges. However, Moneta Group thrives on complexity.

“The level of detail we can handle amazes clients,” says Diederich. “We

quarterback the process for them, often coordinating the roles of their current CPAs and attorneys. We make sure the left hand knows what the right hand is doing.”

Because the firm is committed to independence, advisors are free to select the appropriate financial solution that best meets the individualized needs of its clients. “We don’t answer to shareholders,” says Diederich. “We’re completely focused on what is right for clients.”

### **Extraordinary Extras**

Moneta Group services are not, however, limited solely to high net worth families; Moneta Group also offers advisory services for businesses, charitable organizations, foundations, endowments, and corporate pension and profit-sharing plans.

In addition, founded in 1999, the Moneta Group Charitable Foundation serves as a testament to the firm’s commitment to the community by providing funds for local programs and organizations.

Amid the numerous accolades Moneta Group has accumulated over the years, O'Meara says it's the praise from clients that matters most: “Just yesterday a client told us, ‘I’d be lost without you.’ *That’s* what drives us. We’re deeply passionate about making a difference in our clients’ lives and our community.”



**MONETAGROUP®**

Moneta Group has locations in Clayton **(314-726-2300)** and Chesterfield **(636-787-4700)**.

Visit **monetagroup.com** for more information.