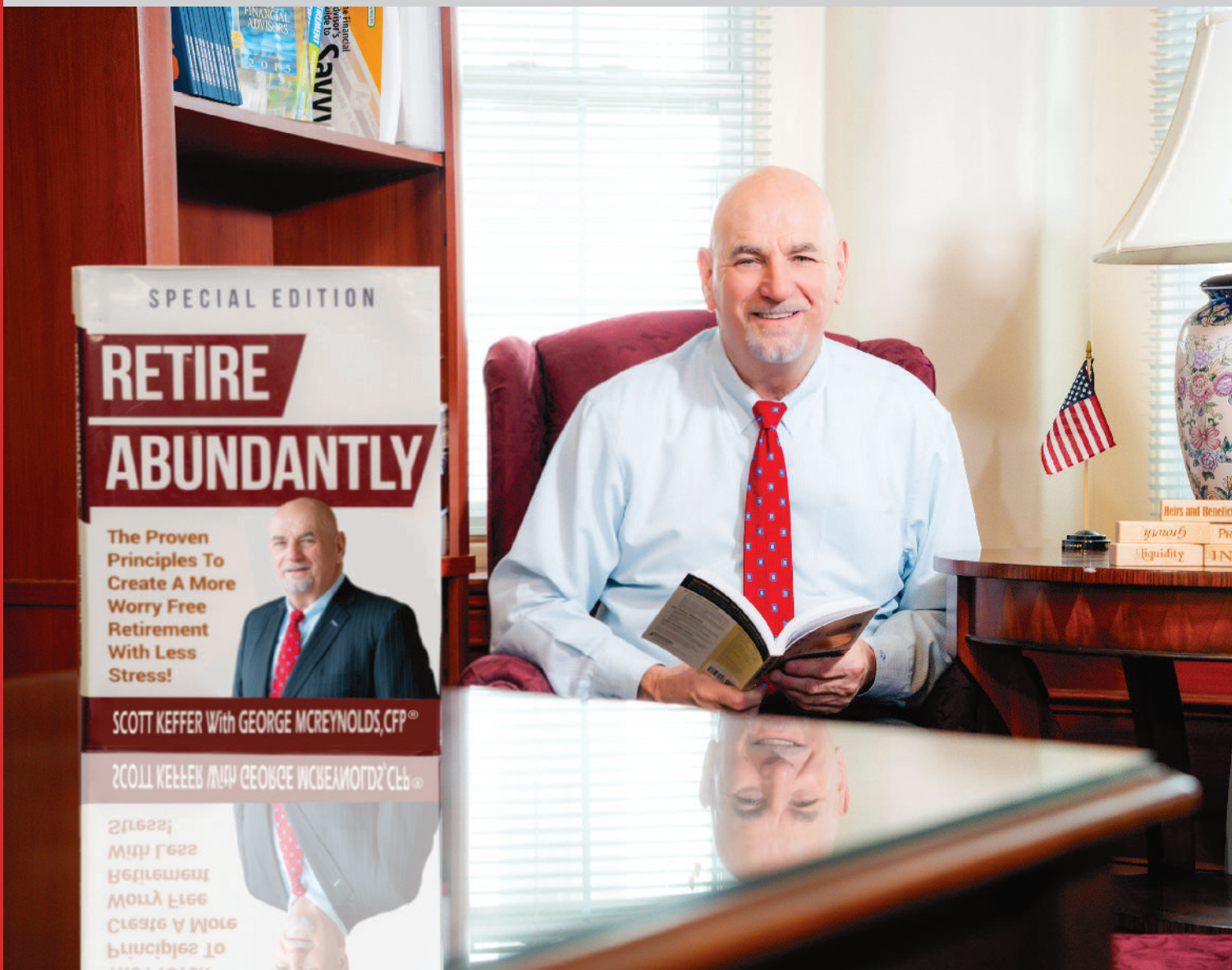


philadelphia

George McReynolds pairs financial expertise with life experience to help guide clients toward a future of abundance, security, and fulfilled dreams.

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A Life Well Lived

George McReynolds pairs financial expertise with life experience to help guide clients toward a future of abundance, security, and fulfilled dreams.

FEW PEOPLE, IF ANY, HAVE A RÉSUMÉ QUITE AS DISTINCTIVE AS THE ONE CULTIVATED BY **GEORGE MCREYNOLDS, CFP®**.

Clients know him for his work as a CERTIFIED FINANCIAL PLANNER® professional, Certified Financial Fiduciary®, and tax professional, though most of them are likely unaware of his rather unconventional backstory. He spent 10 years saving lives as a paramedic. He put life and limb on the line as a SWAT police officer. He worked as an MP in the U.S. Army, including serving on the security detail for the Supreme Allied Commander at NATO headquarters in

Belgium. In his spare time he worked as an EMT in the ER at Landstuhl Army Medical Center.

“I think my life experience, gives me a unique perspective,” he says. “I learned early on about the value of visualization and goal setting, and that’s what helped determine the course of my life. When I became a financial professional, I wanted to help people create compelling dreams, and do everything I could to make sure they have the time and money to be able to enjoy them.”

Through one of the three veteran-owned companies he leads, McReynolds devotes his

time to helping clients build the foundation needed to enjoy lives of well-being.

He characterizes his formula for success as “80 percent psychology and 20 percent mechanics.” Whereas most people tend to focus too intently on the mechanics, he believes success in his line of work begins with the right mindset, being in touch with one’s values, and having a clear-eyed vision of the future.

McReynolds focuses primarily on executives and senior managers within specialty sectors, such as pharmaceuticals, utilities, and public safety. He works closely with each client to gain a firm understanding of the factors that drive them, the things that make them happy, and their hopes and dreams for the future. His clients have an average wealth of more than \$2 million, though his conversations with them involve much more than numbers on a balance sheet.

“How do you want to spend your time in the future?” he says. “Do you want to travel? Do you want to pursue something new and exciting? Do you want to spend more time with your family and share experiences with them that they’ve never had before? No matter what you want to do, the numbers are a means of helping you get to where you want to go.”

A self-described “recovering workaholic,” McReynolds knows a thing or two about making changes for the better. He’s an expert in life coaching and time management, as well as a board-certified hypnotherapist. In addition, he is a five-time participant of the Tony Robbins Firewalk, a life-changing experience in which participants learn about the power of an altered mindset—from one of limitation to one of unlimited possibility.

“I used to spend all my time working, but I knew I had to make a profound change,” he says. “I started taking off 150 days a year so I could really enjoy my life, and I’ve found that my best work and my best ideas come when I’m rejuvenated. Now I take the time to travel. I spend more time with my family. I go to at least one concert a month—the Eagles, Foreigner, REO Speedwagon. When I’m not doing any of those things, I enjoy target shooting and fixing small engines.”

McReynolds has also earned a reputation as an educator and internationally sought-after speaker, with a gift for using tangible and easy-to-understand concepts to explain complex topics. In 2021, he embarked on a speaking tour of the United Kingdom; at the London Stock Exchange he shared the stage with Nigel Farage, a former leader of the Brexit movement and prior member of the European Parliament, and also shared his perspective on goal setting and visualization with an audience at Oxford University.

A prolific author, McReynolds has published titles such as *Prosperity by Design* and *Uncle Joe’s Gems: Small But Valuable Thoughts on Life and Wealth*. He also penned the foreword



“Are you in a position to live the life you want? That’s what I’m here to help you figure out.”

—George McReynolds, CFP®

and afterword for *9 Money Mistakes that Doctors Make*. Forthcoming books include *Defuse the Bomb*, a how-to guide based on a web-based Master Class of the same name, designed to help pre-retirees make informed decisions now so they can enjoy a comfortable retirement later; *Retire Abundantly*, in which he writes about visualization and goal setting, including a case study about an actual couple he worked with to establish goals, create the foundation of a comprehensive retirement plan, and realize their dreams; and *Stop, D.R.O.P., and Roll*, a retirement guide for first responders, particularly as it relates to their participation in DROP, short for deferred retirement option program and Social Security’s PBO (pension benefit offset) and how to restore their benefit.

While McReynolds has lived a full and prosperous life, he has also endured his share of tribulations. His career in law enforcement, for example, involved more than a dozen car accidents and 200 street fights, leaving him “banged up, beat down, and burnt out.” He also had to contend with intensely personal challenges such as the disablement of his parents, the death of two siblings within six months, and caring for a family member who suffered from severe mental illness.

“A lot of bad things can happen in a long life,” he says. “Some of them you can plan for and avoid, and some you can’t. What I got out

of all the experiences I’ve gone through is that, whether you have \$500,000 or \$50 million, all of that can be wiped out in a flash. That’s why I help people from a risk-management point of view first, looking at the real risks that could threaten them. I have a checklist of 22 different risks I review with [clients] so they can understand all the risks they are exposed to and ways to either mitigate or delegate them.”

Such wisdom is just another “tool in the toolbox,” another building block McReynolds uses to help clients safeguard the future and turn their dreams into a reality.

“As people are planning ahead, they should work with someone who understands that there are some things in life that are more important than money,” he says. “To know what those things are, you have to be able to articulate your goals clearly. Are you in a position to live the life you want? That’s what I’m here to help you figure out.” ■

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