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by **Matt Cosentino** | photos by **Jeff Anderson**



A Winning Formula

By utilizing the knowledge of his financial mentors and the values from his life experiences, **Kyle Jennings** emerges as a trusted wealth advisor at **Retirement Planning Specialists**.

Kyle Jennings might not have fulfilled his childhood dream of centering the top line for the Philadelphia Flyers, but his career in wealth management offers constant reminders of the sport that continues to be a passion of his to this day. The values he learned in hockey—discipline, accountability, leadership, teamwork, and understanding that success isn't achieved overnight—are just as relevant in the world of finance as they were during his playing days for a highly successful college program.

"I see a lot of similarities in wealth management," he says. "Just like hockey, financial success requires preparation, consistency, a strong game plan, and the ability to stay composed when things don't go your way. Hockey also gave me a competitive mindset. I've always wanted to push myself, continue learning, and be the best at whatever I'm doing. That mentality has carried directly into my career as a wealth advisor."

Perhaps the most important lesson he learned from hockey that has carried over into his current career: Play for something bigger than yourself.

"That means putting my clients first, working alongside an experienced team, and doing everything I can to help the people who trust me to achieve their financial goals," he adds. "I may not be competing on the ice anymore, but that drive to succeed and be part of a winning team has never left me."

Kyle found exactly the culture he was looking for at Retirement Planning Specialists, a Willow Grove firm founded by Joseph P. Sarappo III. Kyle joined the company as an intern in 2017, quickly rose to a full-time position the following year, and received his securities licenses in 2019.

Joseph, who serves as president of Retirement Planning Specialists and has nearly 40 years of experience in the industry, saw important qualities in Kyle right away.

"He had what I call the elusive trilogy: He was hungry, he had people skills, and he was teachable," Joseph says. "It's my humble opinion that you need all three of those to be successful. As a younger advisor, he's also more relatable to certain clients than someone my age. Those are the things I saw that Kyle had, and he's proven me right."

Kyle always had an interest in finance and investing. Aligning with a company that oversees the financial picture for individuals and families across a wide range of life stages and wealth levels, and making a meaningful impact in clients' lives, gave him a true understanding of the value he's able to deliver to clients.

"Money plays such an important role in almost every major decision we make, whether that's buying your first home, starting a family, putting your children through college, or preparing for retirement," he says. "What I love about this profession is that I'm not just managing someone's investments; I'm helping them build a future, make confident financial decisions, and hopefully eliminate some of the stress that comes with money."

The team at Retirement Planning Specialists has more than 100 years of combined experience, and Kyle eagerly taps into that wellspring of knowledgeable mentors. He is grateful for the way the firm has invested in his development and taught him that the best advice goes beyond reading financial markets to truly understand clients, as well as their concerns and goals.



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>
> ***—Kyle Jennings, Retirement Planning Specialists***

Meanwhile, his fresh perspectives have been a great asset for a firm founded on the philosophy that wealth management is a lifelong process. Also, it is not reserved exclusively for high-net-worth individuals or those nearing retirement.

"I think one of the biggest misconceptions about wealth management is that you need to be wealthy before you need a wealth advisor," Kyle says. "The reality is that building wealth starts long before retirement. It starts with establishing good financial habits, making smart decisions, and having a clear plan for where you want to go. Whether someone is 25 years old and beginning their career or 65 years old and preparing to retire, they can benefit from having someone help them navigate important financial decisions."

As Joseph Sarappo notes, Kyle is more tech savvy than most veteran advisors. He also recognizes that AI can play a role in wealth management while never replacing the effectiveness of personal relationships.

It's those types of bonds that Kyle looks forward to most as his career progresses.

"When someone my age sits down with me, there's a genuine understanding of what they're going through because I'm experiencing many of those same milestones," he says. "But what really excites me is the opportunity to build relationships that last for decades. I don't want to be someone's wealth advisor for just a few years. I want to be there as they grow their careers, raise their families, build their wealth, and eventually transition into retirement.

"At the same time, I enjoy working with clients across different generations," he continues. "Having a younger advisor can also provide continuity for families who want someone to work with their children and grandchildren. My goal is to become a trusted resource for an entire family, not just one individual."

To Joseph, Kyle has bought in entirely to the four pillars that define the company: helping clients accumulate wealth, protect wealth, enjoy wealth, and transfer wealth when the time comes. His commitment to being transparent and straightforward is another reason why the future of Retirement Planning Specialists is in good hands.

"I love what I do, so I'll be doing this as for as long as God lets me," Joseph says. "But the future of the firm is not with me, obviously; it's with younger advisors like Kyle, who truly care about going on this journey with clients."

Looking ahead, Kyle would embrace a leadership role at the only company he's ever known—a chance to wear the "C" on his sweater, in hockey terms. For now he is focused on becoming the best advisor he can be and showing how beneficial a trusted financial professional can be.

"This profession shouldn't just be about investments, account balances, and retirement dates," he adds. "It should be about relationships, education, and helping people feel confident about their financial future. I want to be the kind of advisor my clients feel comfortable calling, not just when the markets are moving, but whenever life changes." ■

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