



Lawrence Gekiere, Sr.  
Firm Founder/ Financial  
Planner

#### Practice Focus

- Individual & Business Financial Planning
- Estate Planning Strategies
- Retirement Plan Selection & Evaluation
- Special Needs Planning
- Investment & Insurance Analysis

#### Education/Certification

- Chartered Life Underwriter (CLU®) – The American College in Bryn Mawr, PA
- Certified Fund Specialist (CFS) -Institute of Business and Finance in La Jolla, CA
- Chartered Financial Consultant (ChFC)-

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### Lawrence Gekiere, Sr.

CLU, ChFC, CFS,

As an independent financial planner, Lawrence has worked in the financial and insurance industry for over 40 years and takes a long-term relationship approach to working with his clients. He works with individuals, business owners and key executives to develop strategies in the following areas:

- Individual and Business Financial Planning
- Estate Planning Strategies
- Retirement Plan Selection and Evaluation
- Special Needs Planning
- Investment and Insurance Analysis
- College Planning

Lawrence holds many professional industry designations including CLU (Chartered Life Underwriter), CFS (Chartered Fund Specialist) and ChFC (Chartered Financial Consultant).

Lawrence helps clients seek financial freedom and independence by helping them establish clear goals and financial discipline. He works with clients to prepare a plan that takes into consideration their goals, unique needs, time frames and risk tolerances. Lawrence is committed to educating clients so they can make well informed decisions and find meaningful financial solutions to their specific, personal circumstances.

Lawrence and his wife Suzy live in The Park Cities, where he is actively involved in the community and Highland Park Methodist church. His community involvement spans a wide variety of non-profit organizations from the arts to education and medicine. Among the list of organization are the Dallas Museum of Art, the University of Texas Southwestern Medical School, Children's Cancer fund and currently serving on the board of Senior Source. He also likes to spend his free time golfing, fishing and oil painting.