Top Kentucky-based Accounting Firm Launches Wealth Management Practice

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Introducing: Dean Dorton Wealth Management

Responding to the needs of current and future clients, and with a strong desire to help our clients become more successful, we, a top Kentucky-based accounting firm, Dean Dorton Allen Ford, are proud to announce the launch of Dean Dorton Wealth Management.

Dean Dorton has provided public accounting services regionally, nationally, and internationally for decades, and we desire to serve our clients in an even more holistic manner by incorporating integrated wealth management services.

“Each of our clients’ personal and professional aspirations may be unique to them, but when it comes to their financial objectives, our clients share the same desire: to build and manage wealth throughout their lifetimes in order to achieve the goals they’ve set for themselves and their families,” says David Bundy, Dean Dorton President and CEO. “We are proud to bring wealth management expertise and resources to our current and future clients in order to bring clarity to their financial situations and to help them define their goals, make smart investment choices, plan for the future and, ultimately, pursue their most fulfilling life.”

As an independent, registered investment advisor based in Kentucky, Dean Dorton Wealth Management offers a broad range of services including retirement planning, investment consulting, portfolio management, and a host of other holistic financial planning services. In addition, the firm delivers a tax-efficient approach to all of the services through collaboration with parent company Dean Dorton.

Dean Dorton Wealth Management is led by David Parks, who has a long history with Dean Dorton. As a CPA, who is also accredited in business valuation, David has over 30 years of experience in providing tax, business valuation, and other financial consulting services to individuals and businesses in the region. David Bundy, who manages Dean Dorton, also serves as a senior advisor in the wealth management practice. Together, they are responsible for serving clients and managing all aspects of operations, including support staff. In addition, as a member of the BAM Alliance (a national network of independent wealth management firms), Dean Dorton Wealth Management has access to a vast array of resources and expertise to enable the firm to effectively and efficiently serve clients.

With the same commitment to excellent client service that has characterized Dean Dorton’s CPA practice for decades, Dean Dorton Wealth Management stands ready to help longstanding, and new, clients manage their investment assets and achieve their financial objectives, through personalized, independent, and comprehensive guidance designed to make their vision a reality.

> “We understand that a client’s overall financial well-being is enhanced and best managed when the advisor takes a comprehensive and personal approach to wealth management. As CPAs, we are problem solvers who take the time to get to know our clients—their families, their needs, their financial circumstances, and, of course, their goals. As wealth advisors, we see an opportunity to deepen that experience, to focus on the bigger picture. We’re able to leverage our existing knowledge of client situations, our tax knowledge, and our business knowledge and skills as CPAs to better serve those that depend on us, existing and new clients alike.”

David Bundy, CPA, President and CEO of Dean Dorton,

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About Dean Dorton Wealth Management

Dean Dorton Wealth Management, LLC is a privately held wealth management firm based in Kentucky. The firm serves individuals, families, qualified retirement plans, trusts, foundations, endowments, and closely-held businesses that want to make an intentional, positive impact with their wealth. Success is measured by their clients' ability to achieve long?term financial results, reach personal and family goals, and leave lasting legacies. Dean Dorton Wealth Management offers expertise in retirement planning, investment consulting, portfolio management, and various other areas of financial planning. The firm employs an evidence-based investment strategy, takes a comprehensive and integrated approach to wealth management, and exercises a fiduciary standard of care in serving its clients. As a subsidiary of Dean Dorton Allen Ford, PLLC, and a member of the BAM Alliance, Dean Dorton Wealth Management has extensive resources available for helping individuals, families, and institutions manage their wealth.

For more information visit www.deandortonwealth.com.

About the BAM ALLIANCE

The BAM ALLIANCE is a network of investment advisory firms that has existed since 1997, when BAM Advisor Services began providing comprehensive back-office solutions to registered investment advisor firms across the country. There are now more than 130 member firms in the BAM ALLIANCE, serving more than 20,000 clients and their families throughout the country and managing/administering more than $30 billion of collective assets (as of June 30, 2018). Detailed information regarding the BAM ALLIANCE's unique approach to wealth management, along with an array of published articles, educational materials, and links to live events throughout the country may be found at www.TheBAMAlliance.com.

For more information, Contact Senior Wealth Advisor, David Parks, CPA at dparks@deandortonwealth.com