

Roger Whitney,
CFP®, CIMA®, CPWA®, AIF®
Partner, WWK Wealth Advisors

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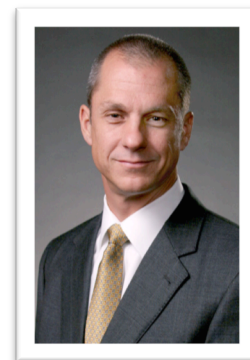
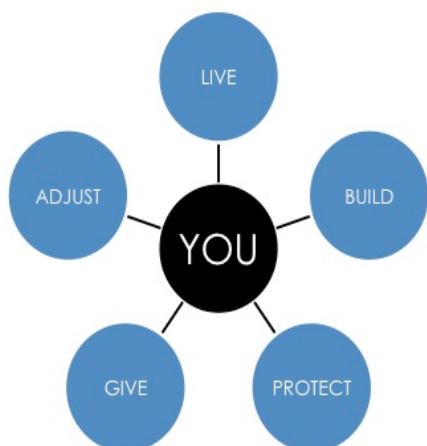


Experience:

Roger began his career in 1990, just in time to witness first-hand the rise and fall of the “new economy” of the 1990s. This experience solidified for him that financial management is about more than money. It is about people and helping them make smart financial decisions as they manage the uncertainties of life.

Roger helps clients that care about more than money. They care about living well. He uses WWK’s **LIVE WELL** process to help clients make smart financial decisions by organizing their financial life around their priorities and having ongoing little conversations to make adjustments as reality unfolds.

- **YOU** – Your 1, 3 & 10 year priorities
- **LIVE** – Lifestyle budget
- **BUILD** – Balance sheet management
- **PROTECT** – Guard against risks
- **GIVE** – Estate planning and giving
- **ADJUST** – Little conversations



Roger is a born educator and speaks often on the subjects of investment and financial management.

He has taught:

- Wealth Management, TCU Extended Education
- Retirement & Employee Benefits, UTA, CFP Certificate program
- Numerous workshops for local organizations including the Fort Worth Business & Estate Council and Texas Society of CPAs

Education & Certifications:

- James Madison College, Michigan State University, 1990, B.A. International Relations
- Certified Financial Planner ([CFP®](#)),
- Certified Investment Management Consultant ([CIMA®](#))
- Certified Private Wealth Advisor ([CPWA®](#))
- Accredited Investment Fiduciary ([AIF®](#))

Professional Affiliations:

- Investment Management Consultants Association (IMCA)
- Financial Planning Association (FPA)
- Tarrant Co. Bar Association (TCBA)
- Fort Worth Club
- Fort Worth Civic Society

Outside of work Roger thrives on adventure. He is a slow but dedicated endurance athlete. He has completed countless marathon, mountain bike and triathlon races, including an Ironman.