ALDRICH ATHLETE

Preparing for Life Before, During, and After Competition

The demands of an athlete and coach stretch far beyond the painted stripes and hardcourt. Aldrich Wealth is on your team as a trusted partner and advisor to help you navigate the financial complexities of professional athletics.

Our Services

FINANCIAL PLANNING

By helping you create a financial playbook, we will provide you with the comfort and confidence you need to make major financial game-time decisions throughout your lifetime. In addition, our advisors will help you answer questions such as:

- What savings strategy will allow me to maintain my target lifestyle in the future?
- If I want to start a business venture, how can I be sure this won't put me at risk of running out of money?
- Will my family and wealth be safe if there is an accident or litigation?

TAX SERVICES

As an athlete, your tax situation can easily become very complex. Effective tax planning allows you to keep more of what you've earned. As your career or business ventures expand, we will be right by your side to give you advice on the best way to structure your next venture. We look for opportunities to minimize your tax liability and maximize your after-tax returns such as:

- Finding opportunities to accelerate or defer receipt of income
- Efficiently managing your tax bracket
- Coordinating your investments so you pay less taxes from your portfolio
- Filing in multiple states

INVESTMENT MANAGEMENT

Sound investment management is critical when it comes to achieving your financial goals. At the center of our investment management process is our investment committee, that provides disciplined, consistent, unemotional decision making. Our core investment principles include:

- We manage the behaviors necessary to be a long-term investor
- We are fiduciaries to our clients
- We believe in asset allocation with a global mandate
- We believe in tax efficiency and cost minimization are paramount
- We strive for discipline, structure and sound judgment as part of a consistent, repeatable and unemotional investment process

FINANCIAL CONCIERGE

As an athlete, many of your needs may go beyond wealth management or tax planning; our financial concierge team helps you focus on your game by organizing, coordinating and navigating your financial and lifestyle affairs, including:

- Management, automation and verification of recurring transactions
- Private bank account monitoring, payment facilitation and oversights, and cash flow management
- Accounting, bookkeeping and budget oversight
- Detailed financial reporting and budgeting

ADDITIONAL EXPERTISE

- Entrepreneurial Ventures
- Estate Planning
- Foundation planning and management
- Transitioning to life after sports

ALDRICH ATHLETE

WHY ALDRICH WEALTH?

- We are fiduciaries to our clients. Our clients' best interests are at the heart of every decision we make.
- Our professionals adhere to the highest ethical standards and have attained the highest credentials in the finance industry, such as the CFP® certification, CFA® charter, and CPA license.
- We manage over $1.7 billion in assets for clients.
- We welcome interaction and collaboration with clients' agents and attorneys to make sure the client receives the best end result.
- We have the expertise and experience to service all aspects of a professional athlete's financial life.

Our Team

Scott Barchus, CPA, PFS

Partner

K. Scott Barchus joined Aldrich in 1994 and founded Aldrich Wealth and Aldrich Retirement Solutions in 1998. Scott has a broad array of expertise in working with high-net-worth individuals. He specializes in the design and administration of qualified plans, fiduciary responsibility, investment management, and financial planning. He holds a Certified Public Accountant license, as well as a Personal Financial Specialist credential. He has also completed the Series 7 and Series 65 exams.

Stephen Nelson, CFP®

Wealth Manager

Stephen joined the Aldrich in 2016 to assist athletes with their financial future through prudent and values-based advice. His experience prior to joining the firm includes investment management, financial planning and advising. He aims to serve and strategize for meeting clients' financial objectives while always upholding a fiduciary standard.

Carl Pinkard, CFP®, CEPA

Partner

Since 2002, Carl has specialized in working with high net worth families, business owners and medical practitioners, providing financial planning and consulting services. He also works with pension committees and assists with a number of non-profit organizations. As a leader of our Private Wealth group, Carl helps shape our comprehensive and integrative service model that provides investment management, financial planning and tax services to our clients.