

Cincinnati Wealth Management Firm
Celebrates First Anniversary by

**ADDING FOUR NEW PARTNERS
& EXPANDING FOOTPRINT NATIONALLY**



Story Provided by LiveWell Capital
Photography by Catie Viox

LiveWell Capital was founded in 2020 to serve clients looking to not only get the most out of their money but the most out of their life. While the name LiveWell might have been new, the five partners were anything but beginners to wealth management. Ben Beshear, David Schimberg, Andy Scarpitti, Brad Weeks, and Tim Miller have over 100 combined years of experience in the wealth management business.

Since launching in September of 2020, the firm has seen growth in all areas, most importantly in client satisfaction and retention. “A good financial plan causes clients to think beyond money,” says Ben

Beshear, who serves as the firm’s CEO. “The irony in great financial planning is that it allows clients to make decisions that aren’t about money, but decisions based on goals and priorities and the things that matter more than money.”

LiveWell uses a planning process that allows clients to look at the five kinds of wealth that they have in their lives. LiveWell calls this “The Five Capitals.” This unique process gives clients a more holistic view of what they value, which allows for better planning.

THE FIVE CAPITALS ARE:

1. SPIRITUAL CAPITAL

What's my purpose in life?

2. RELATIONAL CAPITAL

What relationships are important to me?

3. PHYSICAL CAPITAL

How do I want to spend my time to stay healthy and find fulfillment?

4. INTELLECTUAL CAPITAL

What do I want to learn, and where are the areas in my life where I can gain wisdom?

5. FINANCIAL CAPITAL

What financial goals do I have to make my ideal life possible?

This planning process and approach is working for clients, but it is working for team members too. LiveWell has now grown to a team of 21. The team has created a Culture Code to guide the kind of culture they want every day they come into the office. "A great culture beats any strategy, and this code helps us attract the right people to our culture," says Brad Weeks, who serves as COO.

LIVEWELL CULTURE CODE

- Clients and team members are family.
- People > money.
- We foster authentic positivity.
- We become the best version of ourselves when we serve others.
- We celebrate moments.
- We have an abundance mindset, which means personal growth, thinking big, and gratitude are a part of this culture.
- It is our job to deliver creative planning and a fun/engaging experience to encourage and inspire our clients to live their best life.
- When we do our job, we change the world for good.

In addition to clients and team members, LiveWell's approach is resonating with other advisers. LiveWell is excited to announce that they are adding four new adviser partners to their team and building out a national footprint.

MORGAN RICH is a Cincinnati-based adviser joining LiveWell. Morgan will be adding a wealth of knowledge about deferred compensation planning to the team.

DAVIE COCHRANE and his team of five will be running LiveWell San Francisco. Davie's team specializes in comprehensive financial planning for individuals, families and businesses.

TEK WIEGERT and his team of eight will be running LiveWell Detroit. Tek's team specializes in helping their clients become fully aware of what's possible with wealth management, executive compensation and tax strategies.

CLARK BIXLER and his team of three will be running LiveWell Washington, D.C. Clark's team specializes in retirement accumulation planning, maximizing equity compensation, cash flow analysis and deployment, and designing a personalized financial mosaic for his clients' changing lives.

THE FIRM, POST-MERGER, WILL PROVIDE FINANCIAL PLANNING SERVICES FOR OVER \$1 BILLION IN CLIENT ASSETS.

These mergers will provide more than size. They will also provide a nationally integrated planning network of advisers with expertise that will benefit all clients.

LiveWell hopes to add another 10-15 cities to its footprint over the next three years and will continue to serve Fortune 500 executives and entrepreneurs, as well as individuals and families with a desire to get the most out of their money and life. ❖

Ben Beshear, Timothy C Miller, Andrew J Scarpitti, David M Schimberg and Bradley Scott Weeks use LiveWell Capital as a marketing name for doing business as representatives of Northwestern Mutual. LiveWell Capital is not a registered investment adviser, broker-dealer, insurance agency or federal savings bank. Northwestern Mutual is the marketing name for The Northwestern Mutual Life Insurance Company, Milwaukee, WI (NM) and its subsidiaries. Ben Beshear, Timothy C Miller, Andrew J Scarpitti, David M Schimberg and Bradley Scott Weeks are Insurance Agents of NM.

Wondering if LiveWell Capital can help you reach your financial goals? Visit livewellcapital.com or call 513-366-3618.



CLARK BIXLER
D.C.



MORGAN RICH
CINCINNATI



DAVIE COCHRANE
SAN FRANCISCO



TEK WIEGERT
DETROIT