

Choices Bring Freedom and Confidence to Investors



Patti Brennan, CFP®

With a deep wheelhouse of expertise, financial advisor Patti Brennan guides investors in making wise, personalized choices.

“There is always a solution,” says Patti Brennan, founder of Key Financial Inc. “Whether your goal is small or large, we’ll look at all the factors and find a path that can help you accomplish your dreams.”

The dreams of Brennan’s clients are diverse. Many dream of a comfortable retirement and hope to successfully navigate the ever-changing landscape of retirement income and long-term care insurance while others are making hard choices regarding the costs of medical treatment or paying for a grandchild’s tuition.

Often, presenting realistic choices takes courage, Brennan says: “It’s easy to say, *You’re doing a great job.* It’s far more difficult to say, *I’m worried about you.* Clients can trust that I’ll always deliver the honest truth with tact and compassion.”

◆ COMPREHENSIVE COMPETENCE

Effective planning hinges on accurate analysis of a client’s key numbers, such as cash flow, savings, years until retirement and the amount of risk in the portfolio.

“There is integrity behind those numbers,” says Brennan.

The robust eMoney Advisor reporting system tracks clients’ plans in real time as market conditions change and

day-to-day transactions are made. The software projects outcomes based on various scenarios to help clients understand the impact of certain decisions.

“I want clients to really feel the weight of these decisions before ever investing a dime,” Brennan says.

As a former nurse, Brennan is skilled at encouraging clients to make decisions that will benefit them in the long run but may require discipline and lifestyle limitations in the present.

◆ THE ART OF CARING

As critical as advanced number-crunching is to financial planning, there’s also a flipside that is equally important: the human side.

“Being a woman advisor seems to give me a level of approachability,” says Brennan, whose warm and disarming nature invites clients to open up to her.

Clear communication using everyday language—not industry jargon—is a particular strength of Brennan’s, who puts a strong emphasis on client education.

“Over the course of life—tech bubbles, wars, financial crises, kids going to college—clients know that I’m always just a phone call away,” she assures.

Key Financial Inc. is located at 1045 Andrew Drive, Suite A, in West Chester, PA. For more information, call 610-429-9050 or visit keyfinancialinc.com.

