



THE WORLEY
BANKS GROUP
EVERY ENCOUNTER MATTERS

SERVING *Clients First*

By Maggie Peters


Founded in 2002, The Worley Banks Group has spent nearly 20 years working to put clients' interests at the forefront of its financial advice. Serving as an independent financial planning firm, The Worley Banks Group recently created a Registered Investment Advisor (RIA).

"We created an RIA to be on the client's side of the table at all times," explains Tim Banks, partner. "We are a fiduciary, which ensures we're advising based on what is best for our clients."

"The goal is to ensure total objectivity and transparency between our team and our clients' investments," adds Dave Worley, partner. "This structure aligns with our mission to be a trusted advisor to our clients' families without any conflicts of interest."

The team at Worley Banks takes a holistic approach to financial planning, citing that all financial decisions, no matter how small, will impact multiple other areas of a person's life. The firm's planners serve as a client's personal chief financial officer, getting to know every aspect of the client's finances. This enables the team's planners to help each client make the best decisions for all areas of life.

Clients work with a team at Worley Banks who are best trained for their specific financial needs. "Someone at retirement has totally different issues than someone early in their career," Banks explains. "My passion and focus is helping families plan at retirement and throughout. There are many emotions and decisions at retirement that families have never had in their entire lives leading up to that point. We want to be there to help them."

Banks adds that helping people through these transitions is incredibly rewarding. "Our motto is that every encounter matters," he says. "No matter what the challenges are, we just want to help people." 

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L-R: DAVE WORLEY, PARTNER; RYAN FURLONG, ADVISOR; JORDAN ST. CLAIR, ADVISOR; TIMOTHY J. BANKS, PARTNER



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