

# re: Mark Lamkin, financial adviser

His goal is to draw up a 'financial blueprint' to provide retirement bliss

**Job:** President and wealth adviser, Lamkin Wealth Management, 4310 Outer Loop.

**Age:** 35.

**Education:** Master's in business administration, Bellarmine University; bachelor's in finance, University of Louisville;

**Family:** Married; two children.

**The basics:** Lamkin Wealth Management "is a financial life-planning firm. ... My broker-dealer is Linsco Private Ledger, which is the largest independent brokerage firm in the country. They clear my trades, do my statements and are like the infrastructure for the company."

**Lifestyle changes:** "I'll sit down with an individual and try to determine what type of lifestyle they want to live — and if that is true retirement, or if they want to just quit their job and pursue their true passion later in life in their 50s and 60s. Then we figure out a financial plan that will help them to achieve this lifestyle."

**Putting it together:** Lamkin said there are "two primary clients that I work with. They are pre-retirees or retirees and business owners. I'll sit down and take them through 30 minutes' worth of questions. ... I'll build that financial plan. I'll use institutional money managers. I



Mark Lamkin, president of Lamkin Wealth Management, said, "I'll sit down with an individual and try to determine what type of lifestyle they want to live ... Then we figure out a financial plan that will help them."

may use individual equities, I may use CDs, or bonds, or municipal bonds, depending on the client or their income goals. ... Basically, I am the architect of the financial blueprint that will

get them to that lifestyle."

**More resources:** "I'll look at how much income they need, how much money they have, and I'll look at all of their assets — their 401(k), their IRAs, their

brokerage accounts. I'll have them bring in every statement and I will put that into my financial-planning software."

See LAMKIN, D5, col. 1

## BY THE NUMBERS

**Solid background:** Financial adviser Mark Lamkin says, "I have seven licenses. I am a registered financial consultant, a certified senior adviser and (have) 15 years of experience in this industry. And to me, that is a lot anymore."

**New adventure:** Lamkin said he left PNC's brokerage in December 2000 and opened Lamkin Wealth Management in February 2001.

**Assets:** "In February 2001, of course, we had zero assets, and now I manage about \$35 to \$37 million in assets, which in that amount of time is pretty good. I am pleased."

**Clientele:** Lamkin said his company has 400 to 450 clients.

— Josh Suiter

## Got ideas?

This weekly column spotlights people on the job. Send ideas to P.O. Box 740031, Louisville, KY 40201-7431. Fax: 582-4360. E-mail: jsuiter@courier-journal.com

Photo by Pam Spaulding,  
The Courier-Journal