Young Trio Gives Executives and Business Owners Consistent White-Glove Experience

Bibler Finney Panfil
Private Wealth Management Group of Wells Fargo Advisors

Ryan Bibler, Vince Finney and Joe Panfil, 42, 39 and 35 respectively, bring a rare blend of experience, resources and versatility to wealth management.

"We are well-established," says Bibler, who is a Chartered Retirement Planning Counselor (CRPC®), "but we have a long runway in front of us. That gives clients comfort that we will be around a long time. Our experience is nationally recognized (Bibler and Finney were on the 2018 Forbes' Best-In-State Wealth Advisors list, Panfil was on Forbes' 2017 and 2018 America's Top Next-Gen Wealth Advisors list.) And we relate to all generations."


Standing, from left: Vince Finney, Ryan Bibler and Joe Panfil. Seated: Chelsie Wood and Theresa Kleinhenz.

Three Services for Two Types of Clients

Bibler Finney Panfil serves mostly corporate executives and business owners. "Both need an elite level of care," says Finney, "but each has different needs. Executives are looking for advice regarding stock options, pensions, 401(k)s and non-qualified benefit programs. Business owners are concerned about borrowing, cash management, succession planning and 401(k)s for the entire business."

Both groups get the white-glove Bibler Finney Panfil treatment, which consists of three main services: a multi-generational investment plan updated based on the individual's goals and risk tolerance, implementation of a customized portfolio of investments to bring the plan to fruition, and phone calls and in-person meetings scheduled in advance.

"The frequent contact allows us to give clients a holistic view of their financial picture above and beyond their investment portfolio," says Bibler.

"Each call has a different focus, such as estate investment planning, insurance and reducing taxes. That thoroughness frees up clients to do what they do best, without having to pay daily attention to their financial lives."

A Defined Process

"We have a defined process for everything we do," notes Panfil, CRPC®, Certified Investment Management Analyst (CIMA®) and Certified Financial Planner (CFP®). "Internal processes give our group organization, and external processes help give clients a clear path that's easy to understand and stick with."

The approach has caused peers to take notice. Several who were retiring turned their practices over to Bibler Finney Panfil, saying things like, "I want my practice to go the next level," or "You are doing it the right way," when asked why they chose to be acquired by Bibler Finney Panfil.

Finney gives an example of Bibler Finney Panfil service: "We reviewed a retirement plan for a 7th-generation manufacturing company with 50 employees. We feel our advice saved them a substantial amount of money with a superior investment platform. We offered personal 401(k) advice to every employee at no additional cost."

"It is hard for small businesses to find and keep good employees today," Finney adds. "We help them offer a plan with an extra level of service. People want someone they can talk to, not a random 800 number. We have nine people in the office and our clients and their employees get to know us very quickly."

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