

PETER MALLOUK



Increasing WORTH AND WEALTH

Financial planner builds nationally recognized firm BY KALSEY MCCALL PHOTO BY BETH ALLISON WICKERSON

Peter Mallouk, an Overland Park businessman and renowned wealth adviser, was named one of the top 100 wealth advisers in the country by the Robb Report's *Worth* magazine in October. Mallouk is the only adviser in the Kansas City metro area and Kansas to be named to the list.

As a certified financial planner and estate-planning attorney, Mallouk, a lifelong Kansas City resident, is the sole principal of Creative Planning Incorporated and the Will & Trust Center, P.A., in Overland Park.

To compile the list, *Worth's* editors only considered wealth advisers with at least 10 years of experience and those proven capable of managing accounts of at least \$10 million.

Creative Planning Inc. helps high net worth companies and individuals with money management and financial planning. In fact, Creative Planning manages more than \$275 million for clients in more than 30 states.

When a client visits initially, Mallouk says, the first order of business is to lay out a comprehensive plan.

"We get right down to where the client is and what they are trying to accomplish," he says. "We always take a look at the individual first and build a portfolio that is totally unique to each situation."

But the uniqueness of Creative Planning comes from the expert team that Mallouk has built into the company's Overland Park office. After buying Creative Planning Inc. and revamping the company's mission and operations, Mallouk recruited 15 experienced professionals to work with him in-house.

"No matter whom our clients deal with here, they will be working with someone with a strong educational and professional background in financial planning," Mallouk says. "And we can do everything here. Whereas most people have to coordinate between an investment manager, a will lawyer and a financial planner, we have it all in one place."

In 2004 and 2005, Creative Planning was featured in *Bloomberg Wealth Manager* magazine's "Champions" list of top financial firms in the country. Mallouk has also been featured on the top 150 financial advisers for physicians list in *Medical Economics*, a leading business journal for physicians.

After graduating from the University of Kansas with four majors, a law degree and a master of business administration degree, Mallouk went on to become a certified financial planner, which he says only about one in every 100 financial planners do.

"People have a lot more anxiety with financial planners," Mallouk says. "That's why they like to see experience, professionalism and education."

Even before he took charge of Creative Planning, Mallouk had started the Will & Trust Center, focusing on helping clients implement estate-planning documents to carry out their wishes, avoid probate, eliminate estate taxes and plan charitable giving. Mallouk has personally drafted and implemented more than 3,000 estate plans since the Will & Trust Center began.

Mallouk, who credits his father with his interest in money management, lectures to professional organizations across the country. In addition, Mallouk provides continuing-education courses for financial planners and investment advisers.

Outside of work, Mallouk is the founder and former chairman of KC CAN! (Kansas City Children's Assistance Network), volunteers dedicated to improving the quality of life of children in Kansas City. He serves on the executive board of Pathway to Hope, a charity that helps families coping with a mentally ill relative, and Mallouk received the Wallace Galluzzi volunteer award for his work with Big Brothers Big Sisters.

For more information on Creative Planning or the Will & Trust Center, visit www.thinkingbeyond.com or www.willandtrustcenter.com. ■