

Who We Are

KinneyMunro Wealth Advisors is an independent wealth advisory firm that provides personalized investment management and financial planning services to individuals and families. As fiduciaries, we prioritize our clients' best interests. We offer trust and estate planning, tax strategies, retirement planning, investment management, and insurance solutions – all designed to adapt to the individual needs of our clients.



Brian Kinney

Co-founder

Prior to KinneyMunro, Brian spent nearly 30 years in financial services and banking industry, most recently a Chief Investment Officer at State Street Bank.

Our Philosophy

KinneyMunro's wealth management philosophy revolves around a client-centric approach that prioritizes understanding each individual's unique financial journey. Our strategy integrates multiple facets of a client's life – financial, professional, and personal—by coordinating investment management with comprehensive financial, tax, estate, and risk planning.



Bill Munro

Co-founder

Before KinneyMunro, Bill spent nearly 30 years at JPMorgan working with some of the world's largest investors.

Our Services



Investment Management

Leverage our 60+ years of combined investment experience to build custom strategies that harness in-house expertise and best-of-breed external managers.



Risk Management and Insurance Analysis

Provide income preservation strategies, evaluating insurance, offering recommendations for asset protection, estate tax reduction, and long-term care expense mitigation.



Trust Services

Create trust strategies for minimizing taxes, maximizing wealth transfer, and ensuring client's wishes are fulfilled. We offer guidance on trusts, charitable planning, gifting, and generation skipping wealth transfers.



Financial Planning

Develop comprehensive plans, incorporating financial goals, cash flow, tax strategies, and estate specific objectives.

Our Beliefs

- ✓ You can't replace real investment experience.
- ✓ Smart tax and estate planning lead to better outcomes for clients.
- ✓ Avoid trendy investment products.
- ✓ Investment advice without context is noise.
- ✓ Fees matter, understand what you are paying for.
- ✓ Take a long-term perspective, don't overreact to near-term market movements.
- ✓ Simplicity typically wins over complexity.

Get in touch

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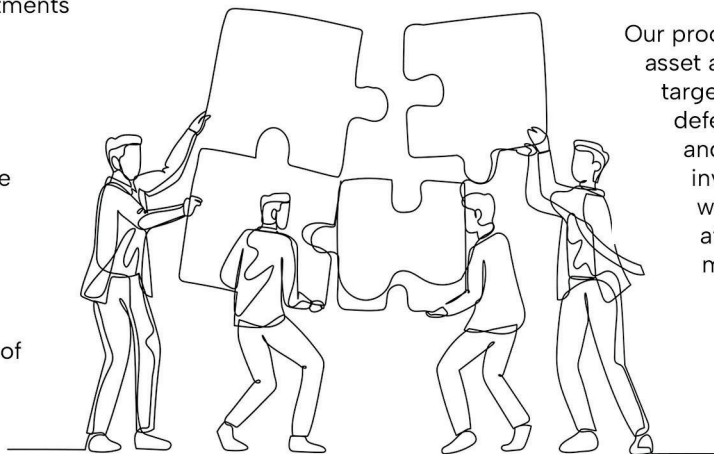


Four Pillars of Wealth Management

Investment Management

KinneyMunro delivers investment management, grounded in experience and tailored to the unique financial journey of each client. Our approach centers on an in-depth understanding of client's specific goals, risk tolerance, and time horizons, allowing us to craft customized investment portfolios.

We strategically diversify investments across equities, fixed income, alternatives, cash, and cash alternatives. We manage both retirement and non-retirement portfolios, employing targeted strategies that seek to maximize after-tax returns. Our goal is to employ long-term strategies to ensure portfolios benefit from the power of compounding, while making periodic adjustments to take advantage of market and tax reduction opportunities.



Tax Planning

We employ a comprehensive approach to tax-efficient wealth management that is integrated into our ongoing asset management services. By collaborating closely with our clients' tax advisors and regularly reviewing returns, our aim is to develop tax planning strategies that address complexities across income, estate, business, and capital gains tax.

Our process leverages strategic asset allocation, direct indexing, targeted tax loss harvesting, tax deferred (retirement) accounts, and management of investment holding periods with the goal of maximizing after-tax returns and minimizing tax liabilities.

Estate Planning

Estate planning is the process of organizing how an individual or families' assets will be managed and distributed during their lifetime and after their death, with a focus on minimizing taxes and legal complexities. The process involves creating wills, trusts, powers of attorney, and healthcare directives to help ensure that personal wishes are honored while seeking to optimize financial outcomes.

We work closely with leading estate attorneys to develop estate plans that reflect each client's unique wishes and objectives. Our approach combines legal expertise and nuanced financial planning with the goal of preserving wealth, minimizing tax liabilities, and empowering clients to achieve their long-term financial and philanthropic goals.

Asset Protection

KinneyMunro partners with preferred insurance providers to implement asset protection strategies, focusing on both safeguarding current assets and planning for the future. We create strategies that help clients preserve their current wealth and mitigate potential catastrophic risks that could lead to negative outcomes.



There is no assurance that any investment, asset protection or planning strategies will be successful. Investing involves risk, including the possible loss of principal. Investment Advisory Services are offered through Mariner Platform Solutions (MPS), a SEC Registered Investment Adviser. MPS does not provide legal or tax advice. KinneyMunro Wealth Advisors and MPS are not affiliated entities.