



**Lee's Summit, MO** – January 1, 2026 - Today, we're proud to announce an important leadership advancement at Beyond Wealth Advisors. Grant Goering has been promoted to **Chief Investment Officer, BWA | Portfolio Strategist**.



Grant has consistently demonstrated the discipline, analytical strength, and strategic thinking that define our investment philosophy. In this expanded role, he will lead the practice's investment strategy, portfolio construction, and risk oversight — ensuring our process remains thoughtful, research-driven, and aligned with the long-term goals of the advisors and families we serve.

As markets evolve, steady leadership matters. Grant brings a measured approach to asset allocation and portfolio design, grounded in structure, prudence, and long-term perspective. His leadership will continue to support advisors across BWA, providing clarity and confidence in how we manage and steward capital.

John Kliewer, CEO of Beyond Wealth Advisors, shared:

*"At Beyond Wealth Advisors, we believe strong leadership and strong process go hand in hand. Grant's promotion reflects not only the meaningful impact he has already made within our practice, but also the trust and confidence we have in his leadership. He brings integrity, discipline, and a steady long-term perspective to our investment strategy. I'm proud of the way he continues to serve our advisors and the families we support, and I'm excited for the future under his guidance."*

Grant, congratulations on this well-earned achievement. We look forward to the continued impact of your leadership.

And to our advisors and clients — thank you for your continued trust in Beyond Wealth Advisors.

#### **About Beyond Wealth Advisors**

Beyond Wealth Advisors focuses on helping clients prepare for their today, tomorrow, and beyond. With nearly 100 years of collective industry experience, Beyond Wealth serves the diverse needs of individuals, families, retirees, business owners and non-profit organizations. Beyond Wealth embraces servant leadership and is committed to helping clients achieve their financial objectives and make a lasting impact with their resources. For more information, visit their website at [www.beyondwealthadvisors.com](http://www.beyondwealthadvisors.com).

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