Beyond Wealth Advisors

Rooted in Community, Focused on Generations

PHOTOGRAPHY BY JANIE JONES

In downtown Lee's Summit, it is common to run into familiar faces while grabbing coffee, browsing local shops, or attending an event on the square. For the team at Beyond Wealth Advisors, those everyday connections are part of what makes their work meaningful. With their main office located in the heart of downtown Lee's Summit, the practice has built its approach around relationships, community, and long term guidance. Today, Beyond Wealth Advisors serves families across the region with a growing team of advisors while staying deeply connected to the community they call home. We sat down with John Kliewer, to talk about their philosophy, their commitment to Lee's Summit, and how their approach to financial planning goes beyond traditional wealth management.

BEYOND WEALTH ADVISORS IS ROOTED HERE IN LEE'S SUMMIT. WHAT DOES BEING A LOCALLY BASED FIRM MEAN TO YOU?

Being rooted in Lee's Summit is not a branding decision. It is a life decision. This is home. It is where we have raised our families, where we worship, and where many of our closest relationships have been built.

That naturally shapes how we serve our clients. They are not just accounts on a statement. They are neighbors and friends. We see them at school events, community gatherings, and around town. When you live in the same community you serve, the level of care and accountability is different. We are focused on building relationships that last for generations.

HOW SHOULD A WEALTH ADVISORY FIRM SUPPORT ITS COMMUNITY BEYOND FINANCIAL SERVICES?

We believe a wealth advisory firm should help steward more than financial capital. It should also invest in the health of the community around it.

Our team looks for ways to support organizations that strengthen families, encourage mentorship, and develop future leaders. We also enjoy helping clients think about how their giving and leadership can make a meaningful impact locally. When families flourish and businesses grow, the entire community benefits.

ARE THERE LOCAL INITIATIVES THAT ARE ESPECIALLY MEANINGFUL TO YOUR TEAM?

We are especially drawn to organizations that support families and invest in the next generation. That includes education initiatives, mentorship opportunities, and faith based outreach.

Our mission is very much multi generational, so supporting programs that help children and young families build strong foundations aligns naturally with the work we do with clients. Strong families help create strong communities.

YOUR NAME SUGGESTS GOING "BEYOND" TRADITIONAL WEALTH MANAGEMENT. WHAT DOES THAT MEAN IN PRACTICE?

For us, "beyond" means we do not stop at portfolio performance. Investment management is important, but it is only one part of the picture.

We help families align financial decisions with their values, their long term vision, and the legacy they hope to create. That often includes estate planning coordination, charitable strategies, business succession conversations, and guidance through generational transitions.

WHAT ARE SOME COMMON MISCONCEPTIONS ABOUT WORKING WITH A WEALTH ADVISOR?

One misconception is that you need to be extremely wealthy before seeking advice. In reality, guidance can be most valuable during growth seasons and life transitions.

Another misconception is that advisors only manage investments. True financial planning connects several areas of life including tax strategy, estate considerations, risk management, and long term lifestyle planning.

WHAT FINANCIAL HABITS HAVE THE BIGGEST IMPACT ON LONG TERM LIFESTYLE FREEDOM?

Consistency matters more than almost anything else.

Living below your means, investing regularly, and staying disciplined through market ups and downs all play an important role. Freedom is rarely created by one dramatic financial decision. More often it comes from steady, wise choices repeated over time.

HOW DO YOU BUILD TRUST WITH CLIENTS DURING UNCERTAIN ECONOMIC TIMES?

Trust is built long before uncertainty arrives.

During volatile markets we focus on proactive communication and revisiting the strategy originally designed for each family. We remind clients why their plan was structured the way it was and help them stay focused on long term principles rather than short term headlines.

WHAT EXCITES YOU MOST ABOUT THE FUTURE OF BEYOND WEALTH ADVISORS?

The generational opportunities ahead are exciting. Many families today are navigating transitions such as business sales, retirement decisions, inheritances, and leadership changes.

Helping families not only transfer assets but also pass along values and purpose is meaningful work. Legacy is less about what has already been accomplished and more about what is being set in motion for the future.

WHAT SETS BEYOND WEALTH ADVISORS APART IN A CROWDED INDUSTRY?

Relationships are at the center of everything we do. Performance matters, but alignment matters just as much. Every financial decision should support a client's values, long term goals, and family vision.

It is also important to note that Beyond Wealth Advisors is more than just one advisor. Our main office is located in downtown Lee's Summit, where we have a team of five local advisors serving families in the community. We also have three additional offices with advisors who share the same philosophy. Working as a team allows us to bring broader experience and perspective to the families we serve.

WHAT MISTAKES DO PEOPLE OFTEN MAKE DURING UNCERTAIN MARKETS?

The biggest mistake is emotional decision making. Selling after markets decline or abandoning a long term strategy because of short term fear can be costly.

Trying to time the market is another challenge. Headlines are designed to capture attention, not provide perspective, and reacting to daily news can easily derail a disciplined plan.

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WHAT FIRST STEP WOULD YOU RECOMMEND TO SOMEONE WHO FEELS FINANCIALLY OVERWHELMED?

Start with clarity. List your assets, debts, income, and expenses so you understand where you stand today. That step alone can reduce financial stress.

From there, focus on small and achievable next steps. Momentum builds confidence over time.

WHY CAN WORKING WITH A LOCAL ADVISORY FIRM PROVIDE STABILITY DURING UNCERTAIN TIMES?

There is something powerful about sitting across the table from someone who knows your family and understands your goals.

Technology can help manage investments, but relationships bring context and perspective. Local, relationship based advice provides continuity and clarity when the broader environment feels uncertain.

At Beyond Wealth Advisors, financial planning is about more than numbers. It is about relationships, community, and helping families move confidently toward the future they envision.

To learn more call (816) 246-8450.

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