



The Kelly Group: Your Small-Town Doctor...of Financial Planning

In an iconic Norman Rockwell 1929 painting, a formally dressed doctor listens intently to what his stethoscope is telling him as it is pressed against the chest of a small doll, while a clearly worried young girl—presumably the actual patient—looks on.

This classic work of art touchingly conveys the values that the proverbial small-town doctor brings to his families: caring, patience, understanding, diligence, and above all a passionate commitment to addressing the needs—physical and spiritual—of the patient and family (as well as any beloved possessions of a little child).

I grew up and still live in a small town—Darlington, MD, among the farms of Harford County. When I look at that Rockwell painting, I ask myself “Did that doctor ever really exist? Does that doctor exist today?” From my own and my family’s experience, I absolutely believe he did—and does.

In 1996, when my uncle Bill and I planted the seeds of the wealth management and financial planning firm that would become The Kelly Group, we pictured ourselves as becoming the Norman Rockwell Small-Town Doctor of Finance. To us, that meant and still means:

- We focus on providing the highest quality client service.
- We practice active listening, working with the client to define their goals, concerns, fears, and dreams.
- We are accessible to our clients and community.
- And above all, we care. We care about client outcomes. And we care about the client, their family, and future generations.

I am proud to say that I believe, during The Kelly Group’s 26 years of service to our clients and community, we have fulfilled this vision and are well positioned to continue to do so—for current clients, their families, and generations to come. It is our mission to continue to build a firm that will be helping its community prosper 100 years from now, a mission to be achieved one relationship at a time.

As your Small-Town Doctor of Finance, we will share with you in future columns our strategies for financial success, our perspective on how to respond and adapt to an ever changing and quite unpredictable world, and reasons why we believe a rational optimism combined with a deep sense of gratitude is the best prescription for a flourishing life.

We wish you and your family a wonderful summer.



THE
KELLY
GROUP
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The Kelly Group

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