



## WOMEN ON LION STREET

Lion Street recognizes the value in having the industry's elite Female Advisors as part of our national distribution network. The following is an example of the high-caliber women on Lion Street.



**Kim Kramer, CWS®, CAP®**  
President, Legacy Wealth Solutions

*Giving back to the community is very important to Kim. She currently serves as a board member for the Community Foundation of Westmoreland County and the Ligonier Valley YMCA, among other boards and associations.*

**Firm: Legacy Wealth Solutions Location: Ligonier, PA**  
**Website: [legacywealthsolutions.com](http://legacywealthsolutions.com)**

**Kim Kramer** is President of Legacy Wealth Solutions, a Lion Street Owner Firm for several years. The firm was the second woman-owned firm to join the organization, and Kim points to the ownership model and culture of collaboration at Lion Street as major reasons to join.

Legacy Wealth Solutions is a financial advisory firm whose sole aim is to help each client align their finances in order to honor their true purpose and passions in life. They offer retirement income and wealth accumulation strategies, asset protection, annuities, life insurance, and long-term care. In addition, the firm offers referrals to professionals who can assist with trusts, charitable giving, estate planning, tax planning and IRA legacy planning.

Kim began her career in financial services in 1981, upon graduating from college. Banking seemed like a good fit for her skill set, so she worked a Mellon Bank as a management trainee at a time when there weren't that many female leaders in the industry. She then spent 10 years as a Vice President and Team Leader with Wells Fargo Commercial Banking Group allowing her to work with many self-made business owners and help them transition their businesses and attract and retain key employees. She saw firsthand how important this work was to the people she was helping, and she realized her purpose in life to make an even bigger impact on others' lives by becoming a financial advisor. In 2009, she became an independent advisor, and has since built Legacy Wealth Solutions into a successful practice.

Kim feels that women are a good fit in this industry since they tend to be relationship-oriented and want to make a real difference in people's lives. She would encourage young women to go into this business and try the independent model earlier in their careers.

Lion Street is proud to call Legacy Wealth Solutions an Owner Firm. We seek strong, fiercely independent advisors to become Owners and join Lion Street's national network of advisors and the high-caliber women like Kim who are already on Lion Street.