



ASPEN FINANCIAL MANAGEMENT, INC.

REGISTERED INVESTMENT ADVISORS



Personal and Professional Background

ALAN KEPFER PRESIDENT

For Alan Kepfer, helping people make the most of their financial assets is rewarding work. Whether it's helping a private client reengineer a move from working life to retirement, or guiding a team of professional money managers who oversee millions in assets for other financial advisors, Alan truly enjoys guiding individuals and organizations to attain higher proficiency, wealth and life goals.

As President of Aspen Financial Management, Alan takes on a couple rolls. First as a leader of a group of professional investment advisors and money managers, and second as a private advisor to individual clients. He sees his role as helping others make well-informed financial decisions and providing greater financial independence, peace of mind, and security in their lives.

With more than 15 years experience in the financial services industry, Alan began his career in corporate accounting with New York Life. Once achieving knowledge of internal corporate accounting, Alan moved on to financial planning and brokerage services with American Express Financial Advisors.

Having attained his goal of financial knowledge from large corporate financial institutions, Alan moved on to accomplish his personal goal of founding and leading a firm that would be consistent with the values and ethics of an elite private wealth advisory firm. Thus in 2000, Alan founded Aspen as a registered investment advisory firm.

Alan's guiding light through the development of Aspen, has been the Rotary International creed:

Is it the Truth?

Is it Fair To All Concerned?

Will it Build Goodwill and Better Friendships?

Will it Be Beneficial to All Concerned?

He encourages not only himself, but the whole firm to think about these guidelines before any decisions.

Alan graduated from The University of Texas at Arlington with a bachelor's degree in Finance in 1994. He currently holds a Series 65 investment advisor license and insurance license.

As a community leader, Alan is currently the Treasurer of the Rotary Club of Angel Fire, NM, a past Assistant Governor of Rotary District 5520 and past President of the Angel Fire Rotary Club. He is also active with his kids' school events, the Chamber of Commerce, and volunteers teaching valuable financial education to students through the local high school.

When he is not working, Alan enjoys spending time with his wife Amy and their two children. Personal interests include geographical reading, travel, economic and world history, outdoor activities, and putting around their 5 acre mountain home with the kids and pets.