

Firm Blends a Seasoned Perspective with a Heart for Service

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MAVERICK
WEALTH MANAGEMENT

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As wealth advisors and managing partners of Maverick Wealth Management, Jeremy J. Walker, CRPC, AWMA® and Matt Hubbell bring an interesting mix of life and industry experience to the work they do for clients. Walker was raised on a dairy farm; Hubbell grew up on a ranch. As

adults, their careers (spanning almost 20 and 30 years, respectively) have included stints at a commodities desk, an independent financial planning company, a large retail broker-dealer, and multiple mutual fund companies.

Today, as they help clients navigate global markets and plan for the future, Walker and Hubbell apply the simple truths and complex lessons they've absorbed throughout their lives.

“We’ve worked on just about every side of this industry, and those experiences have shaped how we view markets, investments, and long-term planning,” Walker says. “At the same time, our personal backgrounds have a lot to do with how we treat and value people. We’re here to do what’s best for our clients, no matter what. They come first, and always will, as long as we’re here.”

Shared Knowledge and Goals Drive the Planning Process

As fee-based financial planners, Walker and Hubbell are big proponents of the fiduciary standard. They develop comprehensive, customized plans based entirely on the needs and goals of individual clients—including those in the agribusiness sector, who comprise about 25% of the firm's client base.

“Few firms focus on family-owned farms and ranches, because they have mostly hard assets. But they need transition plans, and they need to prepare for emergencies. Serving these types of clients is a natural fit for us.”

Maverick Wealth Management's standard practice is to meet with clients at least quarterly and to bring in their families yearly to discuss generational planning. Walker and Hubbell emphasize education on both sides of the table, taking time to understand what's happening in clients' lives as well as educating clients on how markets work and the nature and risks of various investment opportunities.

“Our client relationships are built on transparency and trust,” Walker says. “We have discretionary authority to make decisions on our clients' behalf, but we want our clients to understand what we're seeing, what changes we're making, and why.”

A Truly Independent Approach to Investing

Maverick Wealth Management's name derives partly from the team's trend-bucking investment approach. Walker and Hubbell aren't day traders, and they don't attempt to time the market just right. But they do make preemptive decisions they believe will maximize their clients' benefit in the long run.

"We don't subscribe to the buy-and-hold mentality of investing in this or that mutual fund and just letting things happen," Walker says. "We're 'tactical contrarians.' We make our decisions based on what current and historical market trends suggest, not on what the crowd is doing at the moment. Because we're free to buy and sell ahead of the rush, we can help clients minimize their losses in the long run. Our job is to do for our clients what we would do for ourselves."

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