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FINANCIAL LEADERS

SRS Wealth Management, LLC

Redefining Retirement in an Uncertain Era

"The old rules for retirement don't apply," says David R. Nagy, President and CEO of SRS Wealth Management, LLC. "People are living longer, healthcare costs are rising, and taxes are the biggest retirement expense."

With more than 35 years in the financial services industry, David has made it his mission to help clients navigate the new realities of retirement with clarity and confidence.

SRS Wealth Management approach goes beyond investment returns, focusing on integrated strategies that minimize taxes, generate dependable income, and protect families from market-related and health-related risks.

"As an independent fiduciary firm, we don't have quotas or corporate agendas. Our only obligation is to educate and empower clients, so they make the right decisions."

SRS Wealth Management partners with elite professionals, including CPAs, estate attorneys, and the Ed Slott Elite IRA Advisor Group, ensuring strategies remain at the forefront of tax law and retirement planning innovation. For those who own an IRA, 401(k), SEP, or any other qualified retirement plan, a tax time bomb is ticking as deferred taxes don't ever disappear, they compound with time.

While most firms address investments only, the SRS Wealth Management team designs retirement architectures for clients. This coordinated approach brings together income, tax, risk, and legacy planning under one cohesive strategy.

"We build detailed reports, custom portfolios, and income maps that advisors don't even know how to produce. Clients immediately see the difference in the depth of our work."

A personal story fuels David's passion for educating families about long-term care. His grandmother's battle with early-onset Alzheimer's and grandfather's sacrifice as a caregiver, left a lifelong impression. Additionally, his parents retired young and ran out of money early into retirement due to poor planning.

"Nobody plans for long-term care when they're young, but they should. If you wait too long, it becomes expensive so the people who need it most often can't afford it."

SRS Wealth Management's three-meeting process is designed to educate and empower. The first focuses on values and goals, the second on analyzing existing plans, and the final to outline recommendations. This helps clients understand conversions, income strategies, and tax-efficient estate transfers.

"Most people look at retirement through rose-colored glasses. We prefer conservative assumptions so we can under promise and overdeliver."

David Nagy

Their philosophy is rooted in both realism and care. David has his two nephews working alongside him, sharing his passion for helping families and carrying on the firm's mission-driven approach.

That pragmatism drives David's upcoming second novel, Serenity at the Summit, due out this year. His book compares retirement to climbing and descending a challenging mountain. Reaching the top isn't the finish line; it's the treacherous descent they didn't plan for.

"Our job is to make sure their descent is calm, confident, and successful."

For David, who beat cancer in his twenties, the work is deeply personal.

"I tell my clients that I don't have a job, I have a mission," he says. "Helping people find serenity in retirement, changing their lives, that's the only reward that matters."

SRS WEALTH MANAGEMENT, LLC

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