



## ADVISOR PROFILE

### **Rick Lorence** Financial Advisor

Rick brings a range of business, investment, and legal skill sets to our Little Rock WealthPath office. He spent a decade in corporate law and was the C.E.O. of Rose Care, a senior care facility with 1500 employees and 21 residential facilities. During this time, he enjoyed being responsible for the investments of the company. He eventually chose to become an investment advisor in 2003.

Following 10 years of senior-level corporate and private banking experience at Morgan Keegan, First Security's Wealth Management Division, and IPI Investment Group within the Bank of the Ozarks, Rick joined WealthPath's Little Rock office in 2013 to serve his client's needs.

His focus is on holistic financial planning - a top-down approach that focuses on overall life goals and considers a client's entire financial overview. Rick also counsels and consults plan sponsors on their retirement plans and works with retirement participants.

He has four children and two grandchildren. Rick enjoys spending time with his family, volunteering at church, watching and coaching his children's and grandchildren's sports, and biking. Rick has served as a PTA officer on multiple Little Rock public schools and is currently serving as Treasurer for the Pulaski Heights Middle School PTA.

He is extraordinarily active in the community and has served on numerous state boards, non-profits, commissions, Chambers of Commerce, and various committees. He is also a member of the Little Rock Rotary Club and recently volunteered early mornings for a day camp for children of UAMS employees during Covid-19.

#### **AREAS OF FOCUS:**

- Holistic financial planning
- Fiduciary retirement plan consultative solutions
- Employee-sponsored retirement plan implementation and management
- Wealth preservation and retirement planning strategies
- Complex and advanced estate planning and business continuation

#### **EDUCATION:**

University of Arkansas  
Sam M. Walton College  
Bachelor of Science,  
Business Administration

University of Arkansas, Law School  
Juris Doctor (J.D.)

#### **REGISTRATIONS HELD:**

- Series 7, 66
- Arkansas Bar license 1990-Present

#### **CONTACT:**

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[www.wealthpath.net](http://www.wealthpath.net)