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Tackling Hunger: Local wealth management firm helps fight food insecurity

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Clients are at the center of every facet of Zhang Financial's work. Advisers at Zhang Financial aim to be objective and proactive while forming meaningful relationships with the people they serve.



More than 1 million people struggle with food insecurity in Michigan, which means about 10% of the state doesn't know where their next meal will come from or if they will even have a meal on their table each day.

News Channel 3 is partnering with various companies and nonprofits with their Tackling Hunger campaign, in hopes of ending food insecurity in Michigan and beyond. One Tackling Hunger partner is Zhang Financial, which is no stranger to caring for the people of Michigan and prioritizing their best interests. Zhang Financial is a fee-only wealth management firm that takes a unique approach to financial planning for each client, acting with no hidden biases or sales-driven formulas. The firm's goal is to see all of its clients flourish financially and in other aspects of their lives. Zhang Financial has garnered several awards in the industry, but it is truly the firm's dedication to people that fuels its passion.

With over \$5.6 billion in assets under management, Zhang Financial attributes the firm's success to a three-pronged approach: serving in the best interests of clients, serving the community, and maximizing the growth of employees.

Clients always come first

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Clients are at the center of every facet of Zhang Financial’s work. Advisers at Zhang Financial aim to be objective and proactive while forming meaningful relationships with the people they serve. The experience is more than just “client/adviser.” Zhang Financial’s approach to building customer success extends to a far wider set of considerations.

Every year, a survey is sent to clients to assess their client service managers’ service level, communication skills, and the firm’s asset management. Every survey is reviewed to not only measure client satisfaction levels but to also fully address any open-ended questions that present an opportunity to improve customer experiences. Of the returned surveys, 99.49% said they are very satisfied, and 99.66% said they would recommend Zhang Financial. However, the goal is always 100%, and that is why Zhang Financial will continue to curate unique plans for everyone and strive to improve its processes with every chance it gets.

Philanthropy is the top priority

Zhang Financial has always believed in making a lasting impact in the community, whether it’s through partnerships on initiatives like Tackling Hunger, giving money to

charity, or taking time to interact with people in the community. Over the last decade, Zhang Financial has donated over \$15 million locally and beyond. Some of the recipients of those donations include the Charles and Lynn Zhang Portage Community Senior Center, the Charles and Lynn Zhang Animal Care and Resource Center, the Charles and Lynn Zhang Skylark Ridge at Binder Park Zoo, the Miller Auditorium's Zhang Financial Broadway in West Michigan Series, the Kalamazoo Symphony Orchestra, and Little League baseball teams.

Success starts with each team member

The final component to Zhang Financial's business approach is a commitment to teamwork. Through a diverse knowledge base across the firm, the firm has realized the best solutions for clients come from within, whether it's through investment strategy, income and tax planning, or academic research, just to name a few of the various areas of expertise offered at Zhang Financial.

Above all, employees are vital assets to Zhang Financial, which is why they enjoy opportunities to reach their potential through an objective-based promotion structure, flexible schedules, tuition reimbursement for specific designations, and reimbursement for continuing education costs. All of this helps the firm maintain its culture of education, knowledge, and expertise.

Awards and recognition

The proof is truly in the pudding when it comes to this three-pronged approach of serving the community, clients, and employees. Here are some of the recent honors Zhang Financial has earned in the industry.

- Charles was ranked #1 on Barron's list of the nation's Top 100 Independent Financial Advisors for 2023 and 2021. He has been ranked in the top 2 for the past 5 years.
- Zhang Financial has been ranked No. 6 in the nation on Forbes' list of America's Top RIA firms for 2023. There are over 15,000 RIAs in the nation. Zhang Financial is also the highest ranked firm on the list that is free from conflicts of interest that arise from selling proprietary products, engaging in

principal trading, third-party payments, revenue sharing, receiving commissions, kick-backs, or soft dollars.

- Founder and president Charles Zhang has been named the No. 1 Financial Adviser in Michigan by Barron's for 12 consecutive years from 2013 through 2024.
- Charles was ranked No. 4 in the nation on Forbes' list of America's Top Wealth Advisers for 2023. Charles is the highest-ranked NAPFA-Registered fee-only Financial Adviser and the highest ranked Independent Adviser on the list.
- CEO and Chief Compliance Officer Lynn Zhang has been named to Investopedia's list of the top 100 Most Influential Financial Advisers of 2023, and she was named to the 2023 InvestmentNews Hot List which includes 100 all-star wealth professionals redefining success in the financial industry.

Are you in need of a wealth management adviser? Contact Zhang Financial today or browse their selection of services online.