



Kim S. Luthy, CFP®, CDF®, CFS, CLTC Director of Wealth Planning

Contact Information:

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Professional Affiliations:

Million Dollar Round Table, Life &
Qualifying Member
Morris County Chamber of Commerce
CERTIFIED FINANCIAL PLANNER(CFP®)
Board Member-Foster and Adoptive Family
Services Foundation
Financial Education Network- Retirement
Planning Course Teacher
Founder/Facilitator - The Vision Network
Member FPA-Financial Planning
Member- Institute for Divorce Financial
Analyst (IDFA)
NJ Collaborative Law Group member
Women Rising, Founding Member

Awards and Recognition:

Boy Scouts of America Tribute to Women
Award
Leading Women Entrepreneur Award 2x
Finalist
2020 Top 25 Leading Women
Entrepreneurs of NJ Recipient

As the Director of Wealth Planning with Synthesis Wealth Planning, Kim has dedicated herself to empowering clients to control their own destiny. A highly qualified professional with more than 30 years of experience, she has earned her Certified Financial Planner designation (CFP®) which illustrates her completion of the rigorous experience and ethical requirements of the CFP® Board. In addition to her CFP® designation, Kim has earned the professional designation of Certified Fund Specialist (CFS), Certified in Long Term Care (CLTC), and is a registered representative holding her life, accident, health and long-term care insurance licenses in multiple states.

Kim is also a Certified Divorce Financial Analyst® designation. (CDFA) This enables Kim to provide financial information and assistance to people going through a divorce. It is essential to Kim to be able to help avoid common financial pitfalls of divorce by offering insight into the pros and cons of different settlements serving as their financial advisor.

Prior to joining Synthesis Wealth Management, Kim spent 31 years with Allied Wealth Partners. She was recognized with numerous awards during her time there such as; Associate of the Year, Presidents Club and Total New Sales Leader for June 2015- 2016; June 2016- 2017 & June 2018-2019 amongst others.

By joining Synthesis Kim will be part of a team. She along with her partners, Alex Panas, Dan Singer and Eric Rosenberger share a vision that allows them to leverage an array of resources and a combined skill set that helps to bring creative solutions to their clients' concerns. Their values and ongoing philosophy of integrity is what serve as their compass.

Kim has been recognized outside the financial services community including Court of the Table level within the Million Dollar Round Table. She was also honored by the Tribute to Women Award by the Boy Scouts of America. This award honors outstanding women who serve as exemplary role models for the youth of our area through their vocations or avocations and who live their lives according to the ideals of the Scout Oath and Law. Kim is also a 2x recipient of the Leading Women Entrepreneur Award and named a 2020 Top 25 Leading Women Entrepreneurs of NJ. Leading Women honors women business owners who excel in innovation and advocacy for women. This prestigious award was selected out of hundreds of impressive nominations based on their strong business acumen and ability to both influence and inspire within their respective industry.

Kim is a member of professional associations such as the Million Dollar Round Table and the Financial Planning Association. Kim is highly active with the Morris County Chamber of Commerce where she has served on many committees within the Women in Business group, such as the Steering Committee Board. Kim is a member of a national organization called the Financial Education Network. She teaches pre-retirement and retirement planning courses at local colleges, schools and libraries to 50-70 year olds.

Kim is also a Founding Member of Women Rising, which is a group of professional C-suite Women who are committed to having a positive impact on the world while they grow their business. Her goal is to bring together like-valued women to build relationships and legacy.

Kim earned her Bachelor of Science in Management from Lebanon Valley College in Annville, Pennsylvania. She has been featured on the radio for stations 103.7 WNNJ where she discussed avoiding overspending at the holidays and 101.1 JACK FM where she discussed women and finances, as well as Metro One Radio Network discussing Long Term Care issues. Kim is an active speaker. She has participated in a panel on Core Values, Shift Happens, Overcoming Challenges in Difficult Times, Retirement Planning and more. Kim is the founder and facilitator of women's networking group called The Vision Network. This group is designed to inspire growth and change.

Kim resides in Randolph with her husband Andrew. She has three children, Taylor, Zachary, and Aidan. Kim is most energized by connecting with people and giving back.