



# MERIDIAN

WEALTH MANAGEMENT, LLC



## CHRIS POWELL

Wealth Management Advisor  
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859.285.6882

### The Villages, Florida

2462 Burnsed Blvd, Pinellas Plaza  
Direct: 352.900.5046

### Lexington, Kentucky

100 W. Main Street, Ste. 450  
Direct: 859.543.4516



## My Focus is You and Your Next Level

With over 25 years of experience in business-to-business sales and relationship management, Chris brings a results-driven, client-first approach to financial advising. His career has been built on understanding complex needs, fostering trust, and delivering strategies that align with both financial security and lifestyle aspirations.

As a financial advisor, Chris helps clients navigate the critical transition from building wealth to strategically preserving and enjoying it. He specializes in investment management, tax-conscious strategies, and retirement planning...ensuring every client has a plan that is structured, adaptable, and aligned with their long-term goals. Clients appreciate his ability to distill financial complexity into clear, actionable strategies that empower confident decision-making.

Chris uses the Align & Anchor Process to create tailored financial strategies that balance growth with risk management. He believes financial planning should be proactive and precise, continuously evolving as life and markets shift. Through personalized reviews and strategic adjustments, he ensures every client stays on track.

**My hope is that every client benefits by having a plan that is well organized to help them realize a life well lived.**

Chris and his wife, Suzanne, reside in Lexington, KY, with their children and dogs. Together, they work from offices in Lexington and The Villages, FL, with plans to transition to part-time Florida residency in the future. Outside of work, Chris enjoys traveling, philosophy, bourbon, and being with his kids. He is co-founder of the Stave and Stogie Society and actively involved with Arbor Youth Services, a Lexington Youth Shelter.

## Wealth Well Managed, Life Well Lived®

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Advisory services offered through Meridian Wealth Management, LLC, a Registered Investment Advisor..Top RIA Firm: Forbes.com (Awarded Oct 2024)  
Data compiled by Shook Research LLC based on time period from 3/31/23-3/31/24.



# MERIDIAN

## WEALTH MANAGEMENT, LLC

**41+ Advisors**

A GROWING FIRM

**Over 3.9 Billion**

ASSETS UNDER MANAGEMENT

**48 States**

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## About Meridian

Meridian serves families, institutional investors, non-profit organizations, and high net worth individuals across many different industries. With over \$3.9 billion in assets under management (as of 12.31.2024), established offices in nine cities, and clients in 48 states, Meridian's goal is to continue to grow across the U.S., adding value to the lives of our clients who share our mission and values.

## Technology



## Our Services

We can serve as a trusted source of guidance in the following areas:

✓ Investment & Portfolio Management

✓ Retirement & Financial Planning

✓ Risk Mitigation

✓ Business Succession Planning

✓ Stock Option Planning & Analysis

✓ Annuity, Life & Long-Term Care Insurance\*

✓ Estate Planning

✓ Cash Flow & Budgeting Advice

✓ Wealth Accumulation

✓ Recommendations for Gifted Securities

✓ Fiduciary Advisor on Key Business Decisions

✓ Retirement Plan Consulting

✓ Education Funding

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