



# Travis George

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## Creative Planning – Pathway to Financial Wellness

Lt. Travis George (retired) is a member of Creative Planning’s Practice Development Team, which is comprised of experienced executives and leaders across the country. Drawing on nearly 27 years of law enforcement experience, he specifically supports Creative Planning’s Law Enforcement (LE) specialty practice by educating and empowering the LE community on the value of sound financial planning, and the wellness benefits that result from it. He is passionate about helping first responders reach their full potential, both professionally and financially. Travis retired fully from Law Enforcement in 2021 after serving in the Kansas City, MO metropolitan area, primarily with the Belton, MO Police Department where he worked in a variety of multi-disciplined roles, with his final as the Investigation’s Division Commander. Travis also spent time with the Blue Valley School District Police, the Buckner, MO Police Department, and the Kansas City International Airport Police.

Combined with his Practice Development, and Financial Wellness Education roles, Lt. George leads a client relationship services operations team. He also works closely with Creative Planning’s account custodians and plan fiduciaries to develop problem solving strategies which help support and simplify access to, and management of, various types of investment accounts and government retirement plans and pensions. Travis has a master’s degree in Sociology and Criminal Justice from Lincoln University and a bachelor’s degree in criminal justice from the University of Central Missouri. He graduated from the Missouri Police Chief’s Command College for LE Executives in 2013 and is currently studying to receive his Certified Financial Planning designation, the gold standard in the finance industry. Travis is married to his wife Angie, and they have 6 children between the two of them.

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### Course Description: *Pathway to Financial Wellness*

Financial wellness has been shown to help people be more productive, use less sick leave, and improve morale. Using real-world examples, this session will teach you how the financial planning process can help identify commonly made mistakes, and then provide solutions so first responders and their families can achieve personal financial wellness. Emotional, psychological, and financial wellness are interconnected and must be evaluated interdependently. After taking this course, the student will be better equipped to take charge of their financial future and recognize why the financial planning process must be comprehensive, collaborative, and ongoing.