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## TECHNOLOGY

# 40 Under 40 Honoree: Kyle Brownlee, CSA, RFC — 33

CEO, Wymer Brownlee Tax & Financial Management, Enid, OK

Aug. 29, 2007

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CEO, Wymer Brownlee Tax & Financial Management, Enid, OK

**EDUCATION:** BS Accounting — Oklahoma State University

**FAMILY:** Wife Casie; Children Wren (5), Jace (19 months)

**HOBBIES & INTERESTS:** spending time with family at the lake, playing piano, leading his worship team at church

**PROFESSIONAL AFFILIATIONS:** National Society of Accountants, Oklahoma Society of Accountants, Society of Registered Financial Consultants, Society of Certified Senior Advisors

**What's the one piece of technology that MOST helps you get through your normal workday?**

“Microsoft Outlook.”

**What will be the biggest change over the next five years in the ways tax and accounting firms operate?**

“Offering comprehensive financial services to clients is a must. The older model of a one-dimensional tax firm is being replaced by firms offering better

and more complete services to clients. Communication plans with clients will also be paramount to a firm's success. With technology, clients expect and deserve better communication. It will be easier to serve a larger client base with excellence if we continue to embrace new technologies.”

### **What Kyle's peers and clients had to say about him:**

It's all about the “WOW!” experience that Kyle and his firm provide their clients. His initial vision to add investments and some insurance services to what had previously been mainly a tax and write-up firm provided an opportunity for clients to receive comprehensive financial service under one roof. Under his leadership, the growth of the firm has been amazing, resulting in a tripling of the staff. Now running a thriving full-service financial services practice, Kyle focuses on helping businesses and individuals accomplish four cornerstones: creating, accumulating, protecting and eventually transferring their wealth. Kyle truly believes in providing his clients with comprehensive wealth management services, looking at the whole picture (tax, investments, retirement, insurance, etc.), and he understands that being a financial advisor is more than just a business relationship. He knows it is essentially a partnership, so he takes the time to really get to know his clients and many almost feel that they are his only client. He has a true devotion to his work and always keeps his clients' best interests as his number one priority. He is also highly involved in his community and church, and spends much of his time in service to faith and charity groups. But most of all, he is a genuine individual with a big heart who sincerely works for his clients' best interests.

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