



## KEITH HAMBERG, CFP®

**Managing Partner**  
Beyond Wealth Partners

Keith Hamberg is a Managing Partner and Wealth Advisor at Beyond Wealth Partners, a specialized financial planning practice powered by Savvy. A Certified Financial Planner™ based in Cincinnati, Keith is a key member of the Beyond Wealth advisory team, where he specializes in tax optimization, retirement income planning, and simplifying complex financial structures for families and individuals.

With over a decade of experience in the financial services industry, Keith's professional focus is centered on translating technical financial topics into practical, actionable strategies. At Beyond Wealth Partners, he collaborates with the firm's broader team to help clients navigate the transition into retirement, ensuring their portfolios are structured for growth, risk management, and tax efficiency.

Keith earned his Bachelor of Science in Finance from the University of Dayton. He is a Certified Financial Planner™ professional.

Keith lives in Cincinnati, Ohio, with his wife and their two children. He and his family are active participants in the local community and enjoy exploring the city's parks and cultural offerings.

An advocate for the balance between a disciplined professional life and a vibrant family life, Keith spends much of his time away from the office chasing after his children and navigating the busy pace of family activities. He believes that the most rewarding part of his work at Beyond Wealth Partners is witnessing the moments when a client's long-term planning facilitates personal milestones—such as a confident retirement or the achievement of a legacy goal—allowing them to focus on what matters most to their own families.

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