



## NATE KUNKEL, CFP®

**Principal Wealth Advisor**  
Beyond Wealth Partners

Nate Kunkel is a Wealth Advisor at Beyond Wealth Partners, a specialized financial planning practice powered by Savvy. As a senior member of the Beyond Wealth advisory team, Nate partners with the firm's leadership to deliver technical financial guidance and comprehensive retirement strategies for Procter & Gamble (P&G) employees, retirees, and their families.

Nate has nearly a decade of experience in the financial services industry, focusing exclusively on the P&G community. Within the Beyond Wealth Partners team, he serves as a specialist in the nuances of P&G-specific benefits, including stock option analysis, income planning, and complex distribution strategies. He is instrumental in the firm's implementation of Net Unrealized Appreciation (NUA) strategies and tax-efficient investing through direct indexing.

Nate's entry into the profession was shaped by the University of Cincinnati's cooperative education program, where he witnessed the profound impact that a dedicated, team-based advisory approach has on a family's well-being. This early exposure to the fiduciary standard led him to join Beyond Wealth Partners, where he champions a consultative, goals-first methodology over traditional sales-based models.

In addition to his work with executives, Nate leads the firm's intergenerational planning efforts. He frequently coordinates with the families of the firm's primary clients to provide foundational guidance for young professionals on 401(k) management, Roth IRAs, and life-stage financial planning.

Nate earned his Bachelor of Business Administration in Finance from the University of Cincinnati. He is a Certified Financial Planner™ professional and a member of the Financial Planning Association.

Nate lives in the Hyde Park area of Cincinnati with his wife, Abby. He and his family are deeply rooted in the local community and are dedicated to the continued growth and health of the Greater Cincinnati region.

An active member of the local athletic community, Nate is a dedicated runner, cyclist, and tennis player. He is also a passionate supporter of Cincinnati's professional sports teams. Nate believes the collaborative spirit and discipline required in team sports and endurance athletics are foundational to the mission of Beyond Wealth Partners: providing a tireless, team-oriented effort to help families secure their financial futures.

Follow Nate on [LinkedIn](#) to see his latest updates.