



ADVISOR PROFILE: Kerry Severn

Performing arts heritage

Committed to volunteerism

Faith and family first

CFP® Professional

“Throughout my career, I’ve learned that client needs must come first and must be at the core of every financial solution you put together for them.”



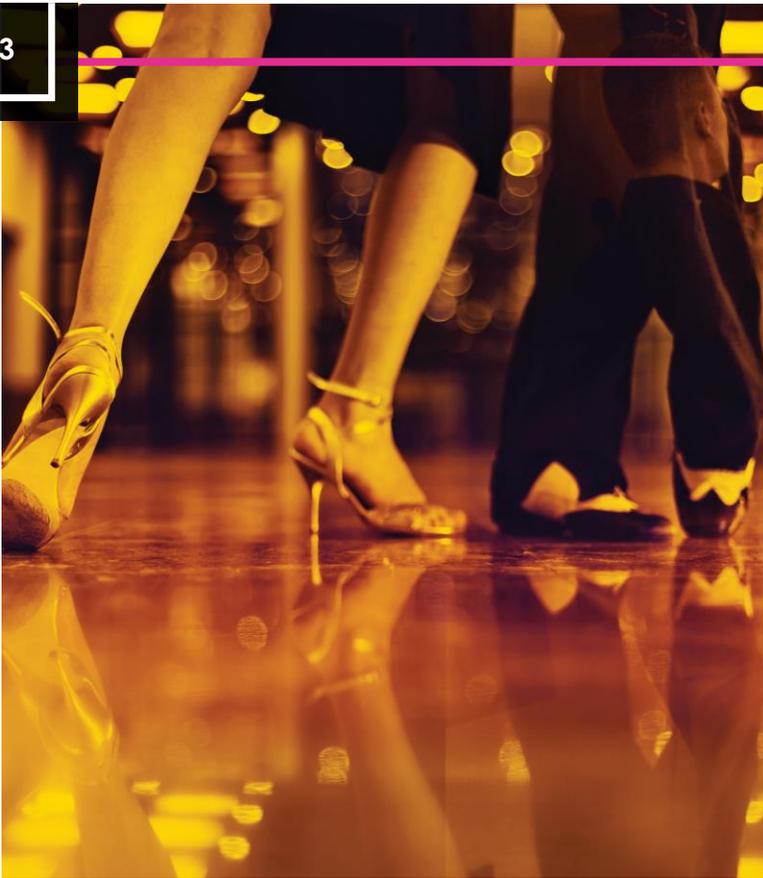
KERRY SEVERN

From a young age, Kerry Severn was taught to help people from all walks of life.

Kerry's father emigrated to the United States from South Africa with his family and became a child actor, along with most of his siblings, in the motion picture business. The Severn children were quite successful in Hollywood until a tragedy resulted in the family having to leave showbiz.

"My grandfather broke his back in a hit-and-run accident and they had to move away from Hollywood to start over," says Kerry. As a result, the entire family pitched in to help with this transition and Kerry's father began running paper routes during high school to help support the family. "Dad was a hard worker who, although he never went to college,
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managed to make his way into the sporting goods world, eventually landing good job with my Uncle Chris at Adidas," Kerry says. "My dad and his siblings made the most of their turn of events and became successful in their adult lives, as well."

Kerry grew up in Thousand Oaks, California, where his father was active as a basketball coach for many years. True to his heritage, Kerry avidly followed two pursuits throughout his youth: basketball and the performing arts. This mix of creative and athletic influence led Kerry to pursue competitive ballroom dancing after enrolling at Brigham Young University in Utah. "At BYU, our ballroom dance team competed internationally on a regular basis," he recalls. "We actually took fifth place at the world championships in Austria while I was in the program." It was during this time that he met Malinda, a fellow competitor in BYU's dance program, who would eventually become his wife.

As an organizational psychology major, Kerry was intent on finding a career where he could help



people via some avenue of public service. After graduating from college, he was persuaded by a friend to move in a slightly different direction and take a job with Fidelity Investments in Salt Lake City. "Malinda and I decided to stay in Utah and start a family there because it was such a great place for raising children," he says. Working his way up from an entry-level position at Fidelity and acquiring skills in areas like bond and options trading along the way, Kerry remained focused on his goal of working with people in a service or advisory capacity.

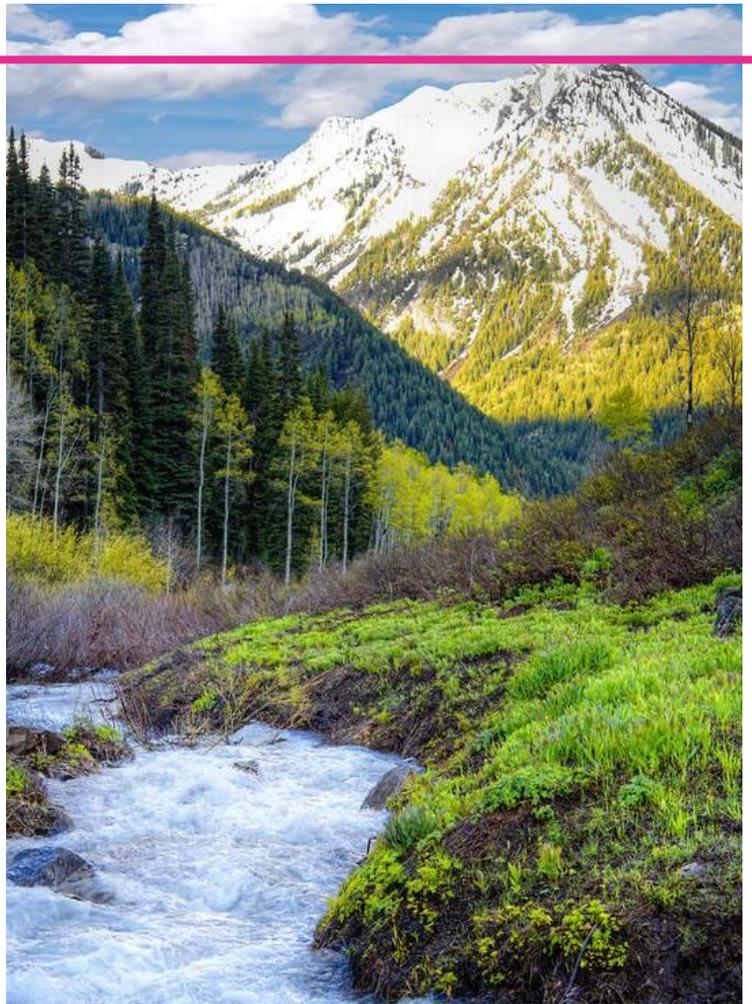
As time passed, the family had a desire to move back to California. "I'd kept in touch with the Fidelity branch manager in Irvine," says Kerry. "After some patience and persistence, he was kind enough to offer me an opportunity to work there as an advisor." They made the move from Utah to southern California in 2001.

"The role in Orange County allowed me to meet people from varying backgrounds and really grow as a person...and as an advisor," he says. It was during this period of growth that Kerry enrolled in and completed Pepperdine's MBA program. Still, there was more to accomplish. "I had been working with Fidelity for nearly 20 years and decided it was time to refine what I was doing as a financial planning professional. I went back to something I was taught at BYU: make sure you do business the right way for the right reasons."

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After completing his MBA, Kerry studied for and passed the Certified Financial Planner® (CFP®) Professional examination. "The CFP® code of ethics was so closely aligned with my view of what a fiduciary is supposed to be, so it really made sense to become a CFP® Professional."

In 2014, with aging in-laws and a desire to explore other career avenues, Kerry and the family decided to move back to Utah. "I'm very grateful for everything I learned at Fidelity, but that was all I knew and all I had experienced professionally," he says. "The relocation was a good opportunity to try something new and see what else was out there." Kerry was offered and accepted a role with Edelman Financial in Salt Lake City area. Edelman subsequently merged with Financial Engines, a change which afforded Kerry another opportunity to evaluate his career path.



"Make sure you do business the right way for the right reasons."

In January 2020, Kerry joined Ashton Thomas Private Wealth in its Draper, Utah, branch office. "Throughout my career, I've learned that client needs must come first and must be at the core of every financial solution you put together for them," he says. "Financial planning can be complex. One size does not fit all. Clients today deserve more. Ashton Thomas is well-positioned to assist me in providing the distinct level of service and advice my clients require."

Kerry and Malinda have been married since 1992 and have three boys and three girls, ages 12 to 24. In keeping with family tradition, all six of the children sing and act. Malinda and Kerry are both active within the Bluffdale arts scene, and both have helped choreograph community musical performances like the Scarlett Pimpernel, Newsies and West Side Story. The family loves gardening together, going on outdoor adventures and volunteering in the community. Their faith is very important to them, and they remain avid readers and dedicated local sports fans.

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