KAY CASTO & CHANEY PLLC
Law. Business. Life

Gary L. Swingle

Gary L. Swingle is a Certified Public Accountant (CPA) and has been designated a Personal Financial Specialist (PFS) by the American Institute of CPAs. Gary is a consultant and professional staff member (non-lawyer) assisting attorneys in the Kay Casto & Chaney's Private Company/Individual Wealth Preservation and Transfer Area. Mr. Swingle has more than 30 years of experience in providing tax planning, tax preparation, management consulting, and litigation support services to privately held businesses, professional firms, and individual clients.

In 2001, Mr. Swingle founded a Registered Investment Advisory Firm (RIA) and limited his services to assisting individual and business clients in wealth accumulation including investment management, wealth growth, wealth preservation, and wealth transfer planning. In his 16 years of experience as the president and manager of the RIA, Mr. Swingle became highly skilled in helping clients think through and determine their financial goals and what was most important for them to achieve, not only in accumulating and growing wealth but also in protecting and tax efficiently transferring that wealth to future generations or charities. These services included teamwork with insurance professionals, investment advisors, and estate and business attorneys in the legal document planning and drafting process Mr. Swingle is also very experienced in assisting both defense and plaintiff lawyers in the complicated tax and financial issues involved with law suit settlements and awards and the use of Structured Settlement Annuities.

Although not a lawyer and not engaged in document preparation, Mr. Swingle has worked closely with numerous clients, estate planning lawyers, and trustees in document planning and the review of wills, trusts, fiduciary powers, and other legal documents. Mr. Swingle also consults with clients to make certain that the titling of assets, the naming of beneficiaries, and the ongoing changes in clients' assets and family relationships coordinate with the documents drafted by the attorney. Mr. Swingle's services help to assure, from a financial and practical standpoint, that the documents meet the clients' needs, wants, and objectives as determined in the financial and estate planning process.

With many years of experience as a Personal Financial Specialist, Mr. Swingle is also quite skilled in explaining complicated documents from a practical standpoint and how the documents will work in accomplishing a client's financial and estate planning goals.

Mr. Swingle is resident in the firm's Charleston office, but serves clients' needs throughout West Virginia.