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Casey A. Marx

President

Member since	10/10/2014
Member through	01/23/2020
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Industry	Financial Advisor
Specialty	Asset/Legacy Protection and Retirement Income

Casey A. Marx is the founder of *Crown Haven Wealth Advisors*, a retirement income planning and asset protection speciality firm located in charming Carmel, Indiana.

A trailblazer, Casey has been recognized by *Forbes Magazine* as one of *America's Financial Leaders*, is continually recognized as a standing member of the *National Ethics Association*, and is a sought after speaker in the retirement income planning field for his unique perspective on retirement income planning solutions for baby boomers and those approaching or in retirement.

As host of Indiana's #1 retirement income planning show *Smart Money w/Casey Marx*, Casey finds great joy assisting Hoosiers guarantee their retirement dollars for a future that they can truly rely on.

Casey believes in continuing his education, so that he can transfer that knowledge as a benefit to his clients—he recently completed a course at Yale entitled "The Global Financial Crisis" lectured by former US Secretary of Treasury Timothy Geithner.

To accompany his other distinguished honors, Casey is currently pursuing the Retirement Income Certified Professional designation at The American College, unanimously considered the #1 designation the field.

"I'm proud to educate my clients in a field where education is viewed as taboo. I *desperately* want my clients to understand the things they can control—*risk and fees*— and how to best control them. It's only a mere result of my thousands of hours and extensive study that I know what I know. That's it...

Am I a Capitalist? *Yes*. Have my clients ever lost a dime due to market risk? *No*. Are my clients ALWAYS successful? *Not* better off than they were...



risk? *No.* Are my clients ALWAYS *exponentially* better off after they work with me? *Yes.*"

In his spare time, Casey enjoys supporting local non-profit organizations, especially those having to do with helping veterans.