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## Leading in industry, happy to help in his hometown

ANDREW CRITCHELOW The News-Enterprise 9 hrs ago



Jason Waters serves as vice president of the Personal Planning Division at financial advice and strategy business ARGI Financial Group. He helped establish ARGI's Elizabethtown branch, which opened three years ago.

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Hardin County native Jason Waters began his financial planning career in Louisville. But when he relocated to Elizabethtown in 2014, he knew he wanted to bring his experience to the place he called home.

Waters, 35, works as a partner at financial advice and strategy business ARGI Financial Group in Elizabethtown, serving as vice president of the Personal Planning Division. A 2002 graduate of Central Hardin High School, Waters went on to earn a degree in finance from Western Kentucky University in 2006.

“I wanted to help people and I had a knack for math and finance,” Waters said of his career choice.

Following graduation, Waters began working with ARG1’s Louisville branch. He said he was one of 10 employees when he started and the company currently employs more than 200.

After returning to the area in 2014, Waters began co-developing an Elizabethtown ARG1 branch. He said the company has a holistic approach, using a variety of in-house financial specialists rather than relying on outsourcing.

“We try to simplify the process for the client,” he said.

The Elizabethtown branch opened in 2016. ARG1 also has branches in Bowling Green, Lexington, Paducah, Cincinnati, Indianapolis and Grand Rapids, Michigan.

Waters said it has been a pleasure to serve clients in the area in which he was raised.

“It means something to help someone you grew up with,” he said. “To me, that’s one of the personally fulfilling things about being in Elizabethtown.”

Waters was instrumental in leading the recent merger between ARG1’s Elizabethtown branch and local firm Stiles, Carter and Associates. The merger was finalized in July, now bringing the Elizabethtown branch’s staff count to more than 40 employees.

Waters said both businesses had similar values and objectives, leading to a merger that organically began over dinner.

“I think any time you look at a merger or acquisition target, culture is the number one thing you have to look for,” Waters said. “Do the two firms share the same belief system? If you don’t have that, then you might as well stop the conversation immediately.”

In addition to his role as division vice president, Waters serves on ARG1’s senior leadership team and on the board of directors. He said he still gets to his favorite part of the job as well: providing one-on-one financial planning with clients.

“I also get to do some of the most fun work that I personally enjoy the most, which is working with individuals with their own planning goals and helping them accomplish what they’re looking to do,” he said.

Waters’ work as a board member also has extended to community boards, including WaterStep, a Louisville-based organization that provides water well repair, sanitation and hygiene education for developing areas of the world. Waters served on this board from 2013 to 2018.

Waters also served as a board member for the National Multiple Sclerosis Society’s Kentucky-Southeast Indiana chapter from 2015 to 2017.

“No matter what you’re doing in your personal life or career, it’s important to give back to others,” Waters said.

Emily Trujillo, communications and public relations specialist for ARG1, said despite his age, Waters has the experience required to be a mentor to many.

“He does this work inside and outside his day to day job all while being a husband and father of two young boys,” she said. “At the age of 35, Jason has already accomplished what most people want out of life.”

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