Dillon Kenniston, CFP®

Consulting & contract work — financial planning, advisor technology, and practical AI.

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Who I help

RIAs and financial planning firms, advisor-technology and fintech teams, and founders building tools for advisors — with particular depth serving clients who own rental real estate.

Problems I solve

- **Advisor AI enablement.** evaluating use cases, governance, human review loops, implementation paths, and real adoption risk.
- **AdvisorTech product strategy.** translating planning workflows, advisor behavior, and product gaps into useful UX.
- **Real estate planning systems.** rental analysis, Schedule E review, tax-aware planning, and client-ready reporting.
- **Workflow automation.** turning repeated manual work into documented, automated, or AI-assisted operating systems.
- **Fractional product work.** discovery, workflow mapping, requirements, testing, documentation, and go-to-market translation.

Proof of work

- **REWealth Reports.** advisor software I built that turns client tax returns into rental-portfolio analysis, scenarios, and client-ready reports.
- **Public webinar (Financial Experts Network).** “CFP-developed software for analyzing investment properties,” a full advisor-facing walkthrough with worked client cases.
- **Product demos.** published “Quick Win” videos on household rent-drag analysis, REPS + cost-segregation timing, and partial asset disposition.
- **REWealth Financial Planning.** a CFP® practice focused on education and real estate investors.
- **PlannerXchange.** a marketplace concept for advisor-built planning tools and workflow apps.

Representative engagements from real client work include a temporary-rental retirement bridge, a sell-versus-repair duplex decision, unlocking idle equity via refinance, coordinating REPS and cost-segregation across high-income years, and finding below-market rent drag across a 10-property portfolio. Detailed walkthroughs available on request.

Let’s talk. The fastest way to start is a short note on who you are, the problem you’re solving, and a rough timeline. Email dkenniston@rewealthplanning.com or connect on LinkedIn.