Our Specialities & Services

3 DIVISIONS

INDIVIDUALS & FAMILIES

EMPLOYERS

Klaas Investment PORTFOLIOS

Fee-based Asset Management

We act as your retirement planning **coach** and **quarterback**.

KLAAS 360
A 360° View of Your Retirement

Fee for Service

We act as your retirement planning **coach**.

KLAAS 401K

Fee-based Employer Retirement Plan Solutions

We work with Plan Sponsors (employers) to provide customized corporate retirement plan solutions (*e.g.*, 401k, 403b, etc.) to their employees.

History **Klaas Financial** has been in business since 1976 and has offices in northern Illinois and southern Wisconsin.

Specialty **We specialize in Retirement Planning** which means that we help individuals, families and businesses *plan* and *invest* for retirement. We strive to provide answers to all our clients retirement questions in 1 place.

Teamwork **We work as a team** to help you achieve your retirement planning goals. If your primary advisor is not available, you can always speak with another licensed advisor who can provide you with the same level of knowledge and service.

Structure **We are an independent "hybrid" firm.** We are able to work primarily as a fee-based fiduciary on behalf of our clients while still maintaining the ability to service commissionable products for them. We do not create securities or insurance products and nothing we offer is proprietary. Instead, we focus on bringing primarily fee-based fiduciary retirement planning solutions to our clients on a fully disclosed basis.

KLAAS FINANCIAL
klaasfinancial.com | 877-495-5227