KLAAS FINANCIAL

your best life—possible.







You've spent years preparing for the best life possible.

If you're like most successful professionals, you've accumulated an impressive portfolio of assets.

However, have you taken the time to find a financial professional to help make the most of those assets?

The professionals at Klaas Financial can help you minimize big mistakes, assess the risks, understand your choices, and develop a financial plan that will allow you and those you care about to live the best life possible.

IMAGINE THE POSSIBILITIES

TURN YOUR ASSETS INTO A PLAN FOR THE FUTURE WITH THE HELP OF KLAAS FINANCIAL.

Effective asset management strategies require two things: the ability for you to develop an investing plan and the ability to manage that plan. The financial advisor associates at Klaas Financial have a history of assisting individuals. Whether you need help making the most of today's assets, planning for retirement, or developing an enduring legacy, we can help you set up a plan that lets you address your life goals now and for years to come.

The professionals at Klaas Financial provide a comprehensive suite of financial services that allow you to most effectively manage and grow your assets through every financial stage of your life.

A WIDE RANGE OF FINANCIAL SERVICES DESIGNED.

STAGE A
Goals
- Preparing an investing plan and goals
- Planning and investing strategies
- Retirement planning

STAGE B
Asset Allocation
- Retirement distribution
- Develop investment policy statement
- Tax efficient investing strategies
- Long-term care and life insurance planning

STAGE C
Wealth Planning
- Estate planning
- Business succession planning
- Family wealth planning

STAGE D
Transferring Wealth
- Legacy planning
- Charitable giving strategies
- Business succession planning
- Estate distribution planning

Transactional Sales
- Wealth ideas/motivation
- Our "customers"

Professional Advice
- Content
- Leadership
- Wealth management strategies
- Meaningful relationships

Advice & Counsel
- Strategic planning
- Guidance
- Helping you make choices
- Assisting with financial challenges

Wealth Counseling & Confidant
- Portfolio guidance
- Network of professionals
- Strategic planning
- Working with family members

PLANNING ▸ ▸ ▸ ▸ ▸ ASSET ALLOCATION ▸ ▸ ▸ ▸ ▸ WEALTH STRATEGIES

A STRAIGHTFORWARD PLANNING PROCESS.

It's easy to feel confused and overwhelmed when planning for your financial future. Our step-by-step discovery process helps to pinpoint your concerns and goals and gives you a chance to ask questions every step of the way. Your personalized plan will be a clear and concise program we've helped design together to address your specific objectives and potentially realize your best life possible.

PLANNING PROCESS

INVESTMENT MANAGEMENT PROCESS

PERSONAL, RELATIONSHIP-BASED SERVICE.

The decisions you make about your investment strategies can impact your future, and the future of the people and institutions you care about. We appreciate the confidence you're placing in our team and take our responsibilities very seriously. Rely on us to take the time to get to know you and help you develop a program that reflects your needs, and not just your financial ones. To deliver not just a plan, but a partnership.