Helping Retirement Dreams for 37 Years

Klaas Financial

Left to right: Maleeah Cuevas, Craig M. Klaas, Steven Schou and Craig J. "CJ" Klaas

How do you measure success? How does a financial services firm really know how it stacks up against its peers?

Aside from the usual indicators – word-of-mouth referrals, longevity of client relationships, assets under management and the like – for the principals of Klaas Financial, Inc., there is nothing so telling as the number of phone calls the firm *doesn't* receive during volatile markets.

"The fact that our phones don't ring off the hook when the market takes a dive tells us our clients feel their retirement money is in good hands," says Craig M. Klaas, president and CEO.

Beyond Stocks, Bonds and Cash

Klaas Financial has been helping people make the most of their retirement years since 1976, with an emphasis on personalized retirement and estate planning based on an in-depth understanding of each client's unique circumstances. Each retirement plan is reviewed regularly and updated as the client's situation or the financial environment changes.

Klaas and CFO Steven Schou, CFP® have not only guided thousands of individuals to a secure retirement, they have spent countless hours refining and fine-tuning their approach. In their experience, one of the best strategies in today's uncertain economic and political climate is a diversified portfolio. "To help clients address their financial goals, alternative investments such as REITs, DPPs and others should be included along with the traditional mix of stocks, bonds, exchange-traded funds and cash," Schou says.

"These investment strategies can potentially be beneficial both for pre-retirees who are still building their wealth and for retirees who are depending on that wealth to generate a steady income for the rest of their lives."

As an independent firm, Klaas Financial does not provide any proprietary products but is free to choose from many investment vehicles. "We have access to some of the best the market has to offer," Klaas says, "and are able to help select investment strategies we truly believe are in the client's best interest."

Klaas Financial has offices in Northern Illinois and Southern Wisconsin and takes pride in the family-oriented atmosphere it has created at both locations. "We go out of our way to make sure everyone who works here or visits feels comfortable," Schou says.

According to Schou, the firm takes a holistic, "big-picture" view of clients' financial lives, coordinating with clients' estate planning attorneys, CPAs and other outside advisors to ensure no detail is overlooked. "We like to say we make the complicated simple – and that our clients sleep well at night."