Gain Financial Confidence

Kammeraad Financial Group, LLC

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"I believe that helping people become financially successful is part of my life's purpose. That changes everything—from how I work, to how we interact, to how I look out for your well-being. I started this business so that I could do the right things and make a difference for each client."

-Jeff Kammeraad, CLU®, ChFC®

What's On Your Mind?

People come to see a financial planner for many different reasons... everything from "I'm here because I think I'm supposed to have a plan" to "I'm here because I want to accomplish X or Y goal."

So what brought you here today?
Fear about your financial status?
Dreams for the future?
Confusion about all the choices?
The urging of a friend?
A nagging sense of "ought to?"
Wellbeing of your family?
Concern about the future of your business?
Desire to leave a legacy?

We want to understand what's motivating you to take action. Then we will help you put all the right pieces in place, so that you feel comfortable and confident about your choices and about your future.

Why Kammeraad Financial?

Genuine Concern
We care about you and your family, and about helping you achieve your dreams.

Experience & Education
We stay on top of emerging issues, new options and changing regulations so that we can help you make appropriate decisions.

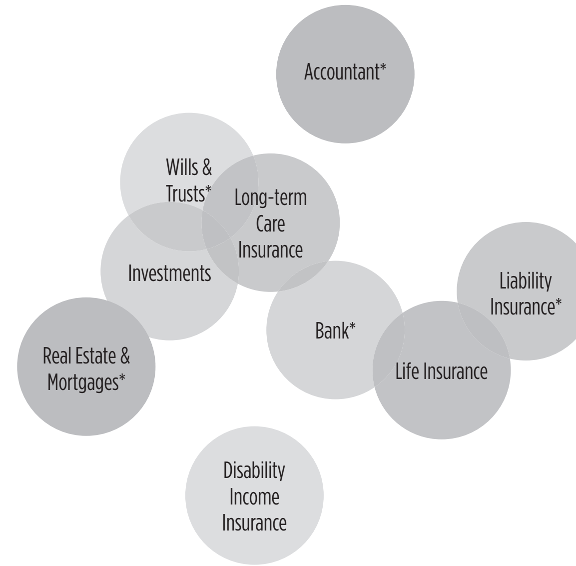
Guidance
We help you evaluate options, make good choices, and take the necessary steps to put your strategy to work.

Goal Oriented
We start with the end in mind. However, we don't "set and forget." We help you set your goals, but then we work with you to help you achieve them, one step at a time.

Comprehensive Analysis
We help you look at the whole picture. The right perspective leads to the right actions.

Simplicity
We try to put complex ideas, concepts, and strategy in easy-to-understand terms.

Proactive Service
It's what differentiates us from the pack. We actively seek ways, on a regular basis, to help you improve your financial situation.



*Our job as coaches is to help you see the big picture and show you how to develop an integrated strategy. We specialize in the investment/insurance components, and will refer you to professionals in other fields if you would like.

How Do We Work Together?

1. Relationship
Let's get to know each other. Are we a good fit?

2. Discovery
We work with you to gather information that will help us understand your current financial position and goals.

3. Analysis
We analyze your situation, and find the things that need attention in order to help you reach your goals.

4. Presentation
We identify any gaps in your current strategy, and update it according to your goals.

5. Implementation*
We'll help you prioritize and organize the steps you'll need to take, and then help you make those changes one at a time.

6. Review
We'll regularly check your progress and make adjustments as needed.

*The client is free to implement the plan recommendations with whomever he/she chooses.

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