



KATELIN KALIK, RFC[®], CDFP[®]

FINANCIAL ADVISOR

SPECIALIZED SERVICES

"We know Christians struggle to align their finances with their faith. We believe biblical financial planning helps our clients grow God's Kingdom and strengthen their families in a chaotic world."

Katelin Kalik

OUR APPROACH

- Regular Virtual Meetings
- Biblically-base Financial Planning
- Financial Behavioral Science
- Goals-Based Planning
- Investment Portfolio Design
- Online Account Access
- Education Workshops

CONTACT

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REGULAR ONE-ON-ONE VIRTUAL MEETINGS

Depending on your selected subscription plan, we meet regularly to build and review your plan.



FAITH & RELATIONSHIP BASED PLANNING

Build stronger relationships when you understand your financial values and communication.



RETIREMENT PLANNING

Develop a strategy designed to help you accumulate retirement assets in a tax-efficient manner.



SMALL BUSINESS SPECIALIZATION

Business owners have unique needs. We provide specialized services and referrals to maximize opportunities.



TAX MINIMIZATION STRATEGIES

Tax minimization is a significant focus of your financial planning. We work with your CPA.



INVESTMENT DESIGN & MONITORING

In addition to tracking shifts in the market, we work to understand your values, track life changes & assets.

NOW ACCEPTING REFERRALS