



# KATELIN KALIK, RFC<sup>®</sup>, CDFIA<sup>®</sup>

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
- Wills, Trusts, Power of Attorney
- Goals-Based Planning
- Investment Portfolio Design
- Online Account Access
- Education Workshops

### CONTACT

-  Life Changing Financial  
11201 N Tatum Blvd #300  
Phoenix AZ 85028
-  [katelin@lcfinancialservice.com](mailto:katelin@lcfinancialservice.com)
-  B: (602) 296-5467



#### 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 style.



#### 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