



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

FINANCIAL ADVISOR

## SPECIALIZED SERVICES


"I believe that you should be able to retire with dignity, and **ENJOY** the experience of getting there. I'm a licensed fiduciary, and I have a legal duty to do what is best for you. **I'm in this to transform your journey to retirement!**"

*- Katelin Kalik*

### OUR APPROACH

- Regular One-On-One Meetings
- Investment Portfolio Design
- Medicare Needs Analysis
- Invites to Seminars & Events
- Online Account Access
- Education Workshops
- Work With Your CPA
- Work With Your Estate Attorney

### CONTACT

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#### REGULAR ONE-ON-ONE MEETINGS

We meet twice a year to catch up, review your plan, and make adjustments based on your goals.



#### SEMINARS, EVENTS & WORKSHOPS

Communication is very important to us and that includes providing quality information & education to our clients.



#### 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 with you to track changes in your life & assets.

## NOW ACCEPTING REFERRALS