

Oswald Financial is Your Retirement Plan Advisor and So Much More!

Our Commitment to You

We are dedicated to helping you pursue your investment goals by providing personal attention and quality services.

How We Help You

We provide cost-efficient portfolio construction, comprehensive wealth management, and ongoing discussions to earn your confidence and help you pursue your goals.

PURSUE YOUR GOALS

MAINTAIN CONFIDENCE

BALANCE RISK, REWARDS

Understand
your goals

Gather
information
about your
situation

Evaluate
your
situation

Discuss
options

Create and
implement
your plan

Monitor
your plan

Discuss
updates and
observations

Our Services

We offer a range of planning resources and services to help you reach your goals:

- Comprehensive portfolio management
- Periodic reviews
- Financial planning
- Investment strategies
- Ongoing investment monitoring
- Insurance solutions
- Cash-flow and tax planning
- Coordination with other professionals
- Wealth management
- Income distribution
- Estate planning
- Retirement planning

How We Communicate With You

We offer scheduled planning reviews, regular check-ins, ongoing education opportunities, and an informative client newsletter. You can also count on a response within 24 hours whenever you contact us with a question or concern.

HOW CAN YOU GET A HOLD OF US?

Call Toll Free: **833.224.5660** OR info@oswaldfinancial.com

- Get Assistance with Investments/Personal Accounts
- Receive Guidance in Making Retirement Decisions
- Learn Options with Your Account at Retirement
- Get Help Managing Outside Investments
- Find Out About Rollover Options

