



Team Approach

Eide Bailly's financial advisors and wealth management team work closely with you to understand your objectives and develop a customized strategy to help achieve your financial goals.

How will planning now help provide financial independence for the future?

Recent legislative, economic and societal changes have highlighted the need for effective and ongoing planning for the future use of your financial resources. Taking the steps now to develop and monitor a financial plan will help ensure your financial objectives can be met.

Eide Bailly's financial service advisors work closely with you and other members of our wealth management team to implement specific aspects of your overall wealth management plan. Utilizing a consultative process, we learn what your wealth management goals are and work with you to create and implement financial strategies to achieve those objectives. Our approach includes extensive data-gathering and confidential data analysis to provide constructive ideas that help you achieve your goals.

What is Eide Bailly's approach to financial planning?

Our financial advisors combine the talents and knowledge of credentialed advisors to provide objective solutions and services. Advisors work closely with other members of our wealth management team, including tax advisors, estate planners, business advisors and valuation specialists, to develop financial planning strategies that are tailored to your specific circumstance and needs. By incorporating different specialties and expertise, we help ensure that all aspects of your financial plan are addressed.

We begin the financial planning discussion with a review of your current situation and your financial goals. Working together, our team will develop a plan that takes full advantage of appropriate opportunities; provides objective, meaningful solutions; and accomplishes your family, business and charitable goals. Because each financial situation is unique, your plan will be monitored on an ongoing basis and our team will provide recommendations to meet your changing needs and situation.

Throughout the financial planning process, we focus on the goal of financial security and follow fiduciary standards of care. Our research-based planning process and investment strategy are customized to match your individual risk preferences and personal situation.

Why should I choose Eide Bailly?

Eide Bailly's holistic approach to wealth management means that your financial advisors work with and are supported by a team of experienced specialists. This team approach provides the opportunity to review all aspects of your financial situation so our recommendations and ideas contribute to achieving your objectives. You will receive personal attention from experienced advisors who provide a well-rounded and independent perspective on financial planning issues. Our commitment to helping you achieve your objectives and dreams is the true Eide Bailly difference.

Experience the Eide Bailly Difference

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Director's Perspective

"Eide Bailly's team approach brings together the talents and knowledge of key advisors who provide objective financial advice that helps you plan for financial independence."

*~ Brad Kelley, Director of
Financial Services
Eide Bailly LLP*

Service Listing

Eide Bailly's financial services team will work with you to define your objectives and provide ways to help you achieve those objectives. We use the following services to facilitate analyses and recommendations:

Planning Services

- Cash Flow Analysis
- Insurance and Risk Analysis
- Education Planning
- Retirement Planning
- Retirement Income Distribution Analysis

Asset Management Services

- Portfolio Design
- Investment Management
- Asset Allocation Services

Insurance Services

- Life Insurance
- Disability Insurance
- Long-Term Care Insurance

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