Jeff Klauenberg is named to 2011 list of Five Star Wealth Managers

BALTIMORE, MD (02/17/2011)—Jeff Klauenberg, MA, RIS, CFP®, owner of Klauenberg Retirement Solutions, has been named to the 2011 list of Five Star Wealth Managers joining an "elite group, representing less than 5 percent of the wealth managers in the Baltimore area."(1)

In a survey conducted for Baltimore Magazine by Crescendo Business Services, Jeff Klauenberg was numbered among the finest in the profession in an effort to find wealth managers who listen to consumers, represent their interests, and operate with an emphasis on integrity and service. The survey of wealth managers included financial planners, investment advisors, and estate planning attorneys. The 2011 list of Five Star Wealth Managers represents less than five percent of the more than 8,200 wealth managers in the Baltimore area.

Survey respondents "were asked to evaluate wealth managers who they know through personal experience and to evaluate them on nine criteria: customer service, integrity, knowledge/expertise, communication, value for fee charged, meeting of financial objectives, post-sale service, quality of recommendations, and overall satisfaction". (2) Each wealth manager was reviewed for regulatory actions, civil judicial actions, and customer complaints as reported by FINRA, the SEC, the State Board of Accountancy, and the State Bar. Finally, a blue ribbon panel comprised of individuals from within the financial services industry reviewed the list of wealth manager finalists.

Klauenberg Retirement Solutions is an independent wealth management firm. They specialize in managing retirement and wealth transfer for pre-retirees (within ten years of retirement), retirees, and family-owned businesses. Their goal is to strive for a "trouble free" retirement through a disciplined approach to managing risk, income, assets, and estate transfer.

By being independent, they provide fee-based financial planning services to their clients free from the conflict of interests of institutional asset managers or product salespersons and are able to maintain full objectivity throughout the financial planning and investment process. The team of Certified Financial Planners (CFP Professional), Retirement Income Specialist (RIS), Chartered Financial Consultant (ChFC), Chartered Life Underwriter (CLU), and Certified Public Accountant (CPA)/Personal Financial Specialist (PFS), specialize in providing customized Comprehensive Wealth Management Services.

(1)baltimoremagazine.net / February 2011
(2)baltimoremagazine.net / February 2011