

Ahlers & Stoll Wealth Management

Going Above and Beyond for Your Retirement Savings

It was just supposed to be a hobby. Twenty-eight years ago, Pam Ahlers was a Certified Public Accountant and the co-owner of Ahlers & Stoll, PC. She attended a conference on investments and wealth management and, intrigued, began studying to obtain her Certified Financial Planner designation (CFP®). As she learned more about it, wealth management began working its way into the conversations she was having with her accounting and tax clients. Before long, they were asking her to manage their retirement accounts as well. “Advice became action,” she says.

“There’s no one magic key to successful wealth management.”

—Pam Ahlers
Ahlers & Stoll Wealth Management

As business grew, the accounting firm opened a new division: Ahlers & Stoll Wealth Management. “My CPA background was really a perfect training ground for financial planning and wealth management,” Ahlers says. “Our wealth management clients are mostly retired, or will be retired within five to 10 years. Therefore, tax planning is a huge factor in every aspect of their



Top, from left: Carrie Moore, Pamela Ahlers, Shelby Ahlers-Rayburn
Bottom: Bridget Anderson

financial life. There’s nothing a CPA understands better than taxes.”

No Magic Wand

Of course, there’s more to wealth management than just taxes. According to Ahlers, there’s no one magical key to successful planning. “It’s all the little things put together that make the



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difference,” she says. “And the fact is that those little things are always changing.” That’s why she and her team make it a practice to always keep on top of what’s happening in their industry.

“I go well beyond the legal requirements for maintaining my professional proficiency and licenses,” says Ahlers, averaging 140 hours of continuing education each year. “We also pride ourselves on employing the latest technologies and offering first-class service.”

In addition, Ahlers’ CFP® designation brings an extra incentive for superior service. As a Certified Financial Planner, she is a fiduciary advisor. This means she is required by law to offer investments that are wholly in the best interests of her clients. This is a much higher standard than the suitability required of brokers.

Ahlers says she strives to make sure her clients understand the possibility they’ll spend more time in retirement than they did in the workforce and helps them plan accordingly. “Our philosophy is one of low risk, low volatility, and safe and secure investments that still offer a reasonable return. We can’t let our clients’ retirement be compromised by poor tax planning or a down market.”