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Helping Create Brighter Financial Futures for Clients Nationwide

Sterk Financial Services

“Money buys you choices,” says Mary Sterk, CEO and founder of Sterk Financial Services. It’s the philosophy she developed while making the remarkable journey from young single mother and welfare recipient to award-winning wealth manager.*

That philosophy guides Sterk in helping pre-retirees understand what they want in the next phase of their lives, whether they are working with her firm on planning for tax-efficient retirement income, financial or estate planning, or investment management.

“My own personal purpose is helping our clients create brighter financial futures,” she says, and her mission has helped many clients in over 40 states realize their dreams, including retiring years earlier than they thought possible.

It Starts With a Conversation.

“To be effective, we need to understand the whole picture. We walk our clients through a five-step process to discover what they’ve done so far, the strengths that got them where they are, and the financial fears they have, so we can help alleviate those concerns. We also talk about the opportunities they want to take advantage of, as well as their hopes, dreams and goals,” she says.

Then it’s time to Plan, Protect and Grow, which is Sterk’s motto.

“All good financial decisions start with a strategic plan that is about more than just the money. It’s about customizing solutions for individuals,” she says. “Then we help protect the wealth they have built and position their portfolio to let it continue to grow.”



The Sterk Financial Services Team

“We help our clients determine the right point in time to move from wealth accumulation to wealth utilization so the money they have is aligned with their life going forward.”

Uniquely, each client is supported by a team to help achieve their aims.

“You don’t simply get an advisor, you get a four-person team working on your behalf,” notes Sterk.

“Your financial advisor creates your custom plan and reviews your portfolio. Our robust research team monitors investments quarterly to help ensure our clients have access to above average choices in their portfolios. And the service team helps clients with any other need.”

That collaboration extends to working with people’s other professional advisors, such as attorneys and CPAs, to ensure their financial plans are coordinated from top to bottom.

Sterk, who wrote *Ready to Pull the Retirement Trigger?*, an Amazon



Plan • Protect • Grow

best-seller in six countries, encourages people to educate themselves on finances and what they want in a financial services firm.

“I believe financial education is part of your own strategic planning. It’s a stepping stone on the path to creating your brighter financial future,” she says. “I recommend asking the following questions when you’re considering a firm: Are they a fiduciary? Do they have a process that helps you clarify your own planning needs and investment steps? Do they have an investment methodology that lets you know they are looking out for you?”

Sterk welcomes the opportunity to see if her firm is a good fit for people seeking a collaborative planning and investment relationship.



Sterk Financial Services
South Dakota office

“We’ve embraced technology that enables us to work with clients from start to finish, no matter where they are in the U.S. We also serve clients from brick and mortar locations in Dakota Dunes, South Dakota and Kansas City, Missouri. The first step is setting up a time to chat by calling or through the contact page on our website.”

350 Oak Tree Lane, Suite 150, Dakota Dunes, SD 57049 | 866-800-2186 | sterkfinancialservices.com

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