

Comfortable Retirement Requires Comprehensive Plan

Klaenberg Retirement Solutions

Americans are losing confidence in their ability to enjoy a comfortable retirement.

“But even in today’s volatile economic market, one long-proven strategy consistently places investors in the best place to reach their goals: Take a comprehensive, disciplined approach that addresses your entire financial life,” says financial planner Jeff Klaenberg, MA, CIS, CFP®.

To provide wide-ranging retirement and financial advisory services that unify all aspects of clients’ financial lives, Klaenberg founded Klaenberg Retirement Solutions in 1983 in Maryland, conveniently located between Baltimore and Washington D.C. The independent, fee-based wealth management firm serves individuals with as little as \$500,000 in investible assets as well as business owners.

“Our mission is to help people enjoy the retirement they’ve worked for.”

—Jeff Klaenberg

Klaenberg and Will Heil, CPA, PFS, CFP®, who has more than 20 years’ experience in accounting and finance, have created a single source of services



Jeff Klaenberg, MA, CIS, CFP® and Will Heil, CPA, PFS, CFP® are committed to the highest ethical standards. They are members of Independent Excellence Group, a nationwide organization of independent advisors.

to help clients build net worth, manage investments, protect assets, create reliable retirement income streams, minimize tax burdens and transfer wealth. Klaenberg and Heil also quarterback the client’s trusted team of outside experts – accountants, attorneys, bankers, tax professionals, and others – to help achieve the best outcomes.

“Our practice model is different from that of traditional wealth management

firms,” says Heil. “We are a boutique, strategically keeping our clientele small so we can deliver a high level of attention. We collaborate to look for creative, multifaceted and often overlooked solutions to meet unique needs.”

Key to clients’ confidence is Klaenberg Retirement Solutions’ unbiased, analytical approach and active management style. Without sales quotas or limited solutions to offer, the team can make recom-

mendations based solely on the best interest of the client. The advisors take an insightful, thorough approach to monitoring the investment environment on a daily basis. With the ability to actively manage their proprietary portfolios, Klaenberg is able to move and manage assets nimbly.

“Our mission is to help people enjoy the retirement they’ve worked for,” says Klaenberg, who was named among the top 5 percent of wealth managers by *Baltimore* magazine in 2011, based on such criteria as customer service, integrity, expertise, communication and value. “It’s gratifying to hear our clients tell us the longer they work with us, the more confident they are that they are being well cared for.”



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Securities offered through Questar Capital Corporation (QCC), Member FINRA/SIPC.
Advisory services offered through Questar Asset Management (QAM), A Registered Investment Advisor.
Klaenberg Retirement Solutions is independent of QCC and QAM.