

Once Upon a Goal

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Navigating Your Financial Voyage

Welcome, to North Star Strategic Wealth Partners. We work with individuals, businesses, and credit unions to create financial strategies for investment, retirement planning, risk management, deferred compensation implementation and management, college savings, and estate planning. We offer a wide array of suitable investment options and planning for all individuals. North Star advisors are seasoned professionals in designing and maintaining retirement benefits for both large and small companies. As fiduciaries, we are obligated to place your interests at the forefront of our advice and investment strategies as we work toward successfully achieving your goals. North Star's mission is to create an environment where individuals have easy access to on demand financial services as well as intimate access to our investment professionals.

Our business was founded in 1983, and has since developed into a full-scale firm that is capable of covering all avenues of 401(k) Plan design, wealth accumulation, and financial planning. We understand that the quest for a comfortable retirement has never been more challenging, for individuals and businesses. Americans are living longer, healthcare costs are rising, and pension plans are disappearing. After almost a decade of economic upheaval, market volatility and low interest rates, investors are seeking guidance to turn the idea of a comfortable retirement into a reality. We are here to help navigate the pitfalls and minefields, and give individuals, business owners, and 401(k) plan participants, a successful plan for retirement.

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