

Allow us to Introduce Ourselves

Frank and Sheri Bautz work with successful families and professionals who want to thoroughly enjoy their retirement, without any fear that they will run out of money.

They take all the time necessary to get to know their clients and understand their unique needs. As a result, they become trusted friends and advisors. As a result of their work, client have the confidence that their financial affairs are in order.

With concierge-level attention and skill, Frank and Sheri help their clients develop a clear vision for their retirement and help them become informed decision makers.

Through their comprehensive five-step planning process, Frank and Sheri help clients with reliable income, protection of their principal, and enough growth to outpace inflation. They help remove the worry that often accompanies retirement, and work hard to replace it with the confidence that comes from knowing their financial affairs are in order. Their goal is to hear clients remark that they are happier, calmer, and enjoying life more.

Frank and Sheri have been a team in marriage and in business for over 25 years. They received their Bachelors of Science and Master Degrees sitting side-by-side, and have worked as a team ever since. Frank and Sheri bring a synergy to financial planning that other teams only dream about.

Frank and Sheri live in Boynton Beach with their three children, Stephe (26), Joshua (23), and Hope (20). Frank is an avid marathoner, having completed 18 marathons and several triathlons. After cheering for Frank from the sidelines for many years, the entire Bautz family recently took to the course together, and crossed the Disney Half-Marathon finish line, hand-in-hand.

Whether you are interested in increasing your income, securing your investments, protecting your spouse and family, or saving taxes, you can depend on Frank and Sheri for objective advice that focuses on your unique requirements.

For experienced financial advice, in a no-rush, personalized manner, please call Frank and Sheri at 561-740-1200 to schedule a complimentary consultation.

Contact

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