MONEY DOESN'T HAVE TO BE COMPLICATED.

Are you confused by most financial advice? If so, you're not alone.

What makes us different

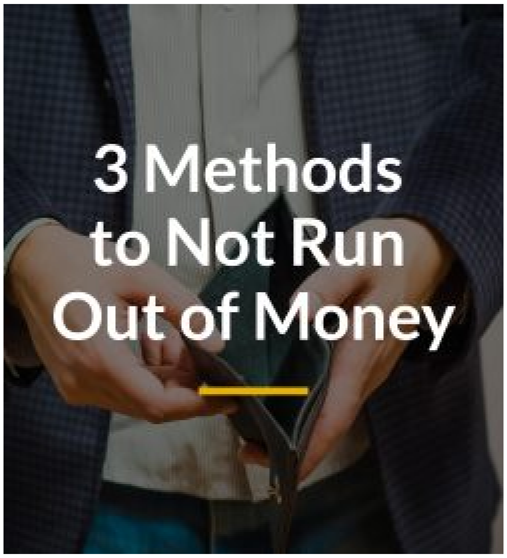
Schedule an appointment

Effective Game Plan

Advice in Common Language

Straightforward Fees

Download one of our free g


3 Methods
to Not Run
Out of Money


4 Common
Mistakes
People Make
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7 Secrets to
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FORBES TOP-RANKED TEAM

BARRON'S HALL OF FAME

InvestmentNews ICONS & INNOVATORS

People deserve to understand what's happening with their money.

Have you ever sat across from a financial advisor and only understood every third word they were saying? And yet they were talking about your money, your life, and your future.

At Kuhlmann Associates Financial, we believe clients underst

advisors should be just as good about explaining inves
are at making them.

+ What are you going to do with my money?

+ Can you handle the complexity of my situation?

+ How can you make my life easier?

Discover the right investment strategy for you.

Tell us a little more about your investment objectives and level of comfort with risk.

By what percentage do you expect your portfolio to grow annually over the long-term (10+ years)?

0–2%

2–4%

4–6%

6–8%

More than 8%

Next

How to get started.

1. Schedule an appointment

2. Meet with us for a custom listening session

3. Get your personalized strategy

Schedule an appointment Watch video

Please provide your name and email and we will have an a

First Name*

Last Name*

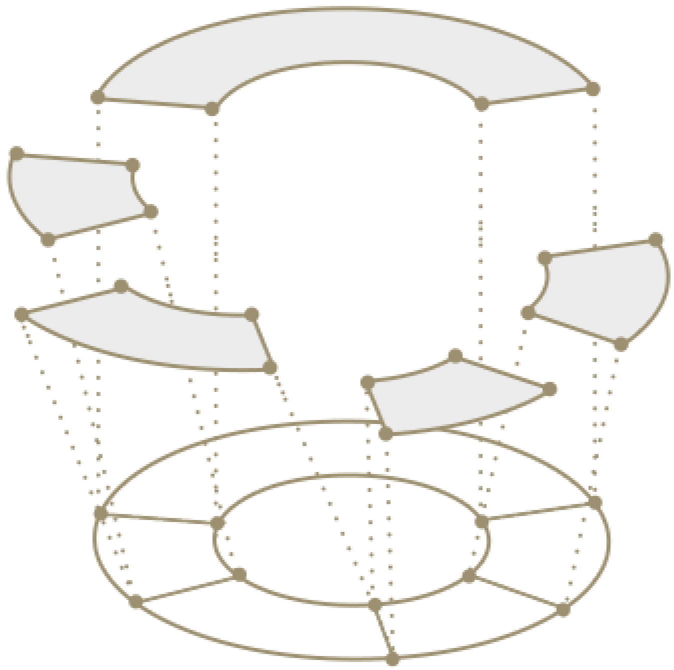
Email*

Phone Number*

Submit

Our financial planning services are built on trust, transparency and accountability.

Our experienced team of professionals will develop a personalized plan that gives you the power – and a path – to work towards your dreams. Explore services



Personalized Wealth Manag

Kuhlmann Associates Financial's mission is to be our client's trusted financial life counselors and family advisor, promoting financial literacy and guiding them through life's transitions. We are a wealth management firm based in Napa, CA serving affluent families, business owners, executives and institutions. Our team seeks to provide the highest level of service for our local and national clients in financial planning and investment management. Contact us today and let Kuhlmann Associates Financial help you on your True Wealth journey.

Investment Management

Disciplined investment strategies are the foundation of our investment management process. Our time-tested strategies are designed to meet a variety of investment goals and objectives.

Read more

Carson Partners

Carson Partners is a network of growth-minded advisors with one common massive transformative purpose: to be the most trusted for financial advice.

Read more

A Personal Message

People often ask what makes us different, the answer is simple. Watch this video to hear a personal message from our Founder and CEO, Kent Kuhlmann to learn what makes Kuhlmann Associates Financial different.

Watch video

Insights

Kuhlmann Associates Financial’s team of professionals provide you with transparent and proactive communications to equip you with the knowledge you need. Read more

News

BUSTING THREE HALF-TRUTHS ABOUT REVER

A few years back, I conducted and published research in the *Planning* that showed Americans don’t understand reverse respondents scored below 50 percent on a 10-question

Read more

Blog post

BULLET-PROOF PASSWORDS

It is a hassle to keep track of all of your passwords. So, many people use the same username and password combination for all of their accounts. This, however, is a big mistake. All it takes is one hacker getting ahold of one of your accounts, and the rest of your accounts are now compromised. Thankfully, there is a pretty easy way around this...One way is a password manager and for those who don’t trust them, try below.

Read more

Weekly Market Commentary

WEEKLY MARKET COMMENTARY – JULY 1, 2019

The S&P 500 slipped slightly last week after reaching a new high the previous week. The S&P 500 declined 0.3%. The MSCI ACWI inched 0.1% higher, and the Bloomberg BarCap Aggregate Bond Index rose another 0.4%. Yields continue to fall as expectations of an interest-rate cut mount.

Read more

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