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Why We Are Different

The Roman author Plautus said that “your wealth is where your friends are.”

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Welcome to Chad J. Karl website

You know how people that work for large companies have a Human Resource director they can go to for any questions on insurance, retirement plans, benefits, etc.? Well, I am that person for retirees and those without an HR Director: We are your “one stop” to address many of your needs and questions regarding insurance planning, retirement planning, estate planning, tax planning, investment planning, and more.

You have probably noticed that I don’t often ask for introductions: That’s because I never want to make you feel obligated, put you on the spot, or make you feel uncomfortable.

At the same time, given all of the turmoil over the last several years, I see some things that concern me. I see financial advisors getting paid commissions upfront and then not monitoring investments or not getting together for



annual strategic planning sessions. I see other advisors not acting as a liaison with other professionals, such as tax preparers and estate planning attorneys. I see new clients not understanding what their previous costs for investing were.


For these reasons, if there is anyone that you care about, that could benefit from a complimentary second set of eyes, I would be glad to help them. Thank you in advance.

Creating Financial Strategies for Your Retirement Goals

If your plans for retirement turned out to not be true, when would you want to know?

Please Call us Anytime at **(608) 758-2222**

[Click Here to Ask a Question](#)



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