CLIENT PORTAL LOGIN

Morningstar

(https://fp.morningstar.com/)

TD Ameritrade

(https://www.advisorclient.com/)

MoneyGuidePro

(https://www.moneyguidepro.com/tdameritrade/Guests.aspx?gst=10D21587BBD6C12598E460653C654FF82C9EF138F7025FFB2086599197BFA0AE)

Welcome to Excel Financial

Excel Financial is an independent fee-only investment advisory firm.

Unlike financial product vendors that masquerade as investment advisors, we have a fiduciary responsibility to serve the interests of our clients first -- always. Our relationships and interests are tied to those of our clients.

We accept no commissions and have no sales quotas, and thus have no corresponding conflicts of interest. Simply put, we succeed when our clients succeed.

EXCEL Financial
THE POWER of INDEPENDENCE

Planning for your Financial Future

Financial Planning

A financial plan is your road map for ach[illegible]ancial life goals. Creating and managing a prudent financial plan greatly improve[illegible]bility of achieving your desired life goals and avoiding p[illegible] along the way.

Financial Planning

Learn More (http://excelfinllc.com/our-services/)

Investment Advisory & Management Services

Asset allocation and portfolio manager[illegible]s are key determinants of the achieved performance and variability of your inv[illegible]folio over time. Getting the most from your available resources requires care[illegible]iplined security selection and ongoing portfolio management.

Investment Advisory & Management Services

Learn More (http://excelfinllc.com/our-services/)

Retirement Plans

Employer retirement plans offer trem[illegible] for business owners, employees, and sponsoring companies. Selecting the [illegible] and vendors to meet your needs and managing their implementation and ong[illegible]ram operation requires expertise, focus, discipline, and the application of prudent management practices.

Retirement Plans

Learn More (http://excelfinllc.com/our-services/)

Risk M[illegible]ment

What happens if...? Risk management [illegible] of evaluating risk and implementing strategies to help ensure that your fina[illegible]rks, even if life throws you a curve ball.

Income Distribution

The transition from a growth focus to [illegible]ome production is significant. Income distribution planning focuses on maximi[illegible]e-producing capability of your available assets while ensuring required reliabilit[illegible]ntaining flexibility to meet unexpected financial needs.

Learn More (http://[illegible]/our-services/)

Income Distribution

Learn More (http://excelfinllc.com/our-services/)

Legacy Planning

Legacy planning is the process of ensurin[illegible] transfer of assets at death and provision of authority sufficient to meet ongoing n[illegible]ent of incapacity. Making these decisions up front helps ensure that events occur as [illegible]d reduces the burden on loved ones during already difficult times.

Legacy Planning

Learn More (http://excelfinllc.com/our-services/)

Tax [illegible]ing

Managing your tax bill is an important s[illegible]ing the value of your assets and income potential over time. Tax planning invo[illegible]tification and selection of investment products and strategies designed to redu[illegible]es and maximize your income and assets.

Tax Planning

Learn More (http://excelfinllc.com/our-services/)

"You should fire your broker and find an investment advisor. Brokerage firms would like you to think that they perform the same function as investment advisors. Many brokers call themselves 'financial consultants' or 'financial advisors'. But they are not the same as independent investment advisors... an investment advisor's fiduciary duty is on a higher plane, like that of a lawyer, a trustee, or the executor of an estate."

- Arthur Levitt, Former SEC Chairman

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92.8519133)Hastings, MN 55033 (https://www.google.com/maps/place/Excel+Financial/@4
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92.8519133)

Hours: Mon - Thurs: 1pm - 5pm
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92.534493)
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92.534493)

Hours: Mon - Thurs: 9am - 1pm
or by appointment

info@excelfinllc.com (mailto:info@excelfinllc.com)
(888) 688-6441
(651) 388-6441
(651) 319-9430

919 Vermillion St. Ste 110
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92.534493!3m4!1s0x87f7892e9e875227:0xc38a5e883c4f151!8m2!3d44.565964!4d-92.534493)
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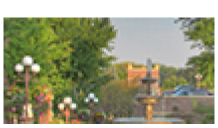
gst=10D21587BBD6C12598E460653C654FF82C9EF138F7025FFB2086599197BFA0AE)**

Excel University BLOG

We've compiled resources, from articles and newsletters to videos and flip books. And we're always adding more. We want to educate you in the world of financial investment to help you make more educated decisions about your finances.



BROWSE OUR RESOURCE BLOG (http://excelfinllc.com/blog/)

EXCEL FINANCIAL LINKS

- Privacy Policy (http://excelfinllc.com/wp-content/uploads/2018/01/Privacy-Policy-Notice-2018-1.pdf)
- ADV Disclosure (http://excelfinllc.com/wp-content/uploads/2018/01/ADV-Part-2A-and-all-Part-2B-09.27.2017.pdf)
- Excel Introduction (http://excelfinllc.com/wp-content/uploads/2017/12/Excel-Firm-Brochure-w-Disclosure.pdf)
- Pursuing a Better Investment Experience (http://excelfinllc.com/wp-content/uploads/2017/12/2017-Pursuing-a-Better-Investment-Experience_-Excel-Branded-w.-disclosure.pdf)
- Website Disclosures (http://excelfinllc.com/website-disclosures/)

OTHER HELPFUL WEBSITES

- DWC The 401K Experts (http://www.dwc401k.com)
- Dimensional Fund Advisors (http://www.dfaus.com/)
- Aspire Financial Services (http://www.aspirefinserv.com/)
- Employee Fiduciary (http://www.employeefiduciary.com/)
- 401K Help Center (http://www.401khelpcenter.com/)
- CFP Board (http://www.cfp.net)