HAAS FINANCIAL GROUP The Power of Personalized Planning (/)

Aligning Your Personal

# Values, Vision and Wealth

We strive to provide a personal approach to financial planning – one that understands who you are, what you're passionate about and what you value most.

We Believe in the Power of Personalized Planning

# OUR SERVICES

*See how we may serve you today*

## Consulting Services (/consulting-services)

Planning is not a science; it is an art. We want you to have a truly personalized plan that considers the many variables in your life and creates a roadmap with clear milestones, so you can know where you are relative to your goals over time.

## Investment Strategies (/investment-strategies)

We actively consider the investment challenges our clients face. As you age, you will need greater certainty that your wealth will meet your goals. Through an objective assessment that translates investment complexity into simple to understand concepts, we help balance loss tolerance with expectations for growth and/or income.

## Legacy Planning (/estate-and-legacy-planning)

Smart giving is about control and leverage; control over how your assets are divided, over the conditions required for receiving assets and over current and future taxes, all in an effort to identify how best to pursue your legacy goals.

Looking to learn more?

# Get in touch today

Contact Us (/contact)

## Latest Blog Posts

### Concept of Four Tax Buckets (/blog/concept-four-tax-buckets)

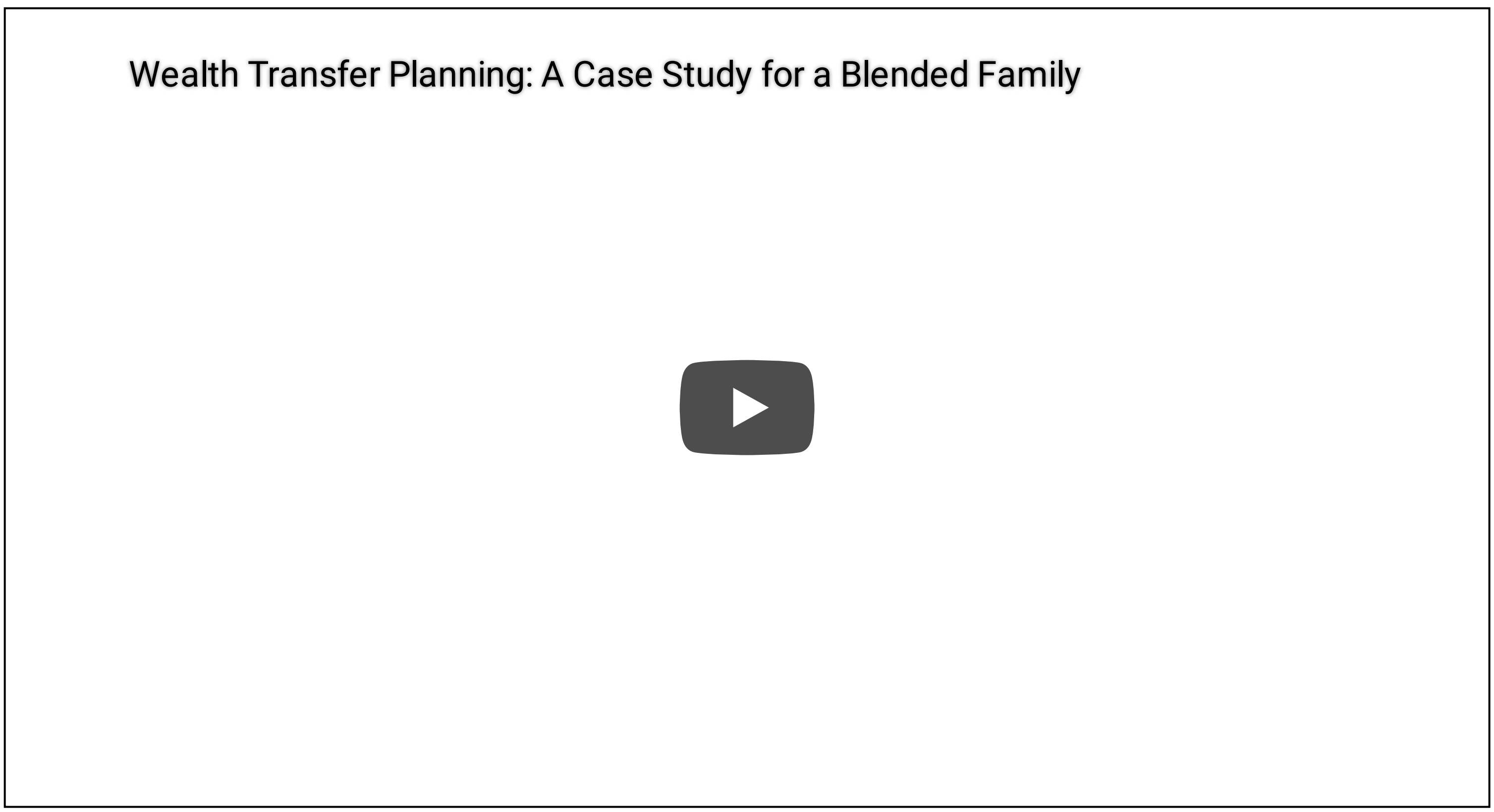
The Concept of the Four Tax Buckets

Tags:
Estate and Legacy Planning (/category/estate-and-legacy-planning)
Financial Planning (/category/financial-planning) Retirement Planning (/category/retirement-planning)
Tax Saving Strategies (/category/tax-saving-strategies)

Read more (/blog/concept-four-tax-buckets)

# Wealth Transfer Planning: A Case Study for a Blended Family (/blog/wealth-transfer-planning-case-study-blended-family-0)

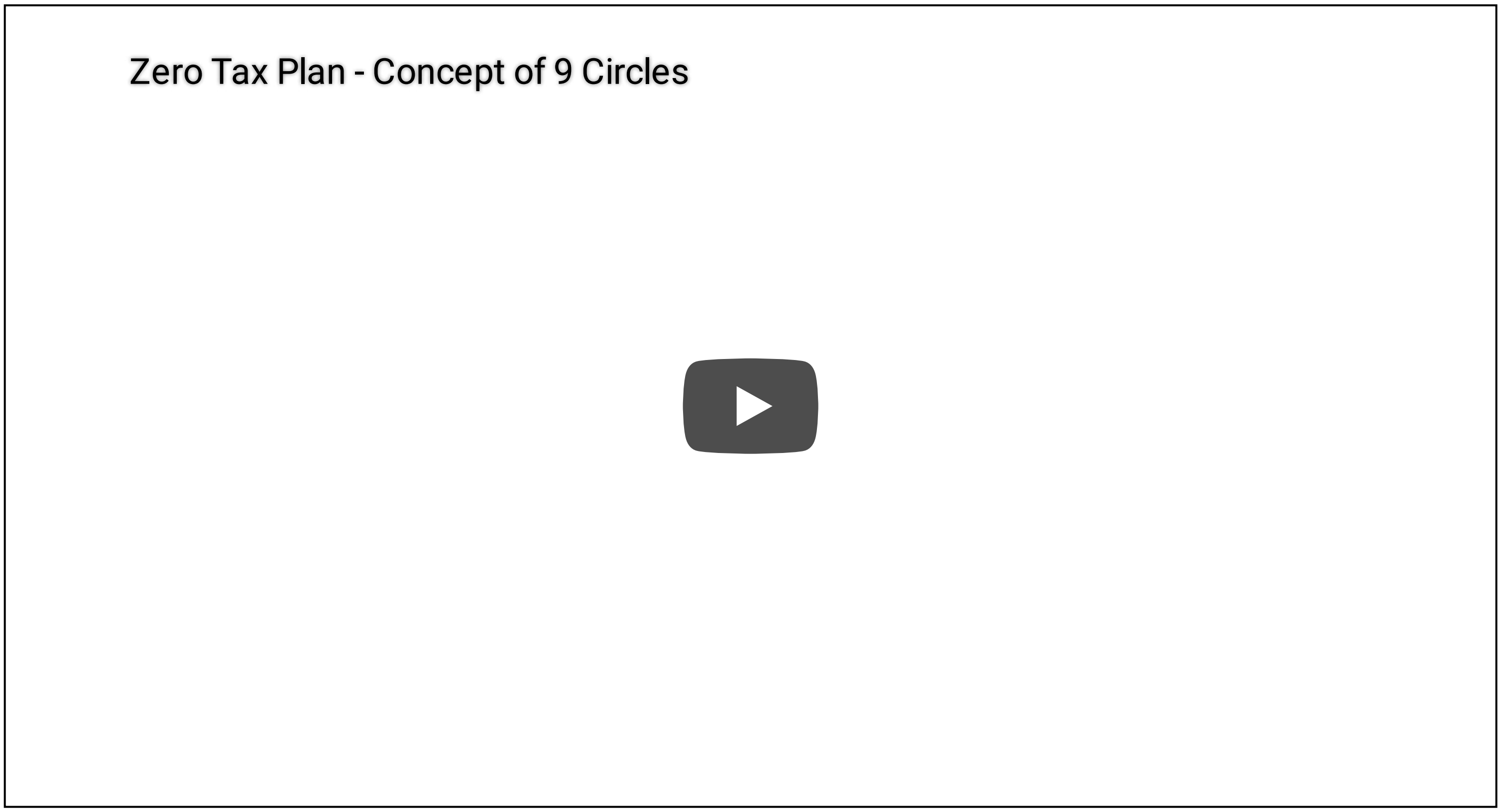
Wealth Transfer Planning 6 of 6




Tags:
Estate and Legacy Planning (/category/estate-and-legacy-planning) Gifting (/category/gifting)
Inheritance (/category/inheritance) Wealth Transfer (/category/wealth-transfer)

Read more (/blog/wealth-transfer-planning-case-study-blended-family-0)

## Zero Tax Plan - Concept of 9 Circles (/blog/zero-tax-plan-concept-9-circles-0)




Tags:
Estate and Legacy Planning (/category/estate-and-legacy-planning) Inheritance (/category/inheritance)
Required Minimum Distribution (/category/required-minimum-distribution)
Tax Saving Strategies (/category/tax-saving-strategies) Wealth Transfer (/category/wealth-transfer)

Read more (/blog/zero-tax-plan-concept-9-circles-0)



**Additional Info**

Sitemap (/sitemap)

Legal, privacy, copyright and trademark information (/node/268)

## Contact info

172 West Main Street, Kutztown, PA 19530

484-648-4040

info@haasfinancialgroup.com (mailto:info@haasfinancialgroup.com)

## Contact us

*Name*

*email@example.com*

*Message*

Submit

Securities offered through LPL Financial, Member FINRA (http://www.finra.org/) and SIPC (http://www.sipc.org). Investment advice offered through U.S. Financial Advisors, a registered investment advisor. U.S. Financial Advisors and Haas Financial Group are separate entities from LPL Financial. The LPL Financial Registered Representatives associated with this site may only discuss and/or transact securities business with the residents of the following states: CO, FL, IN, MA, NC, NJ, OH, PA, TX, VA, WV.