

Filbrandt & Company

The Trusted Financial Resource for University Professionals

800.431.9740

Our Goal Is

Your Financial Independence

Why Comprehensive Financial Planning?

Comprehensive Financial Planning For University Professionals

Our proactive approach to financial planning services focuses on the individual goals and unique lifestyle you have as a university professor or physician.

**Investment
Management**

**Retirement
Planning**

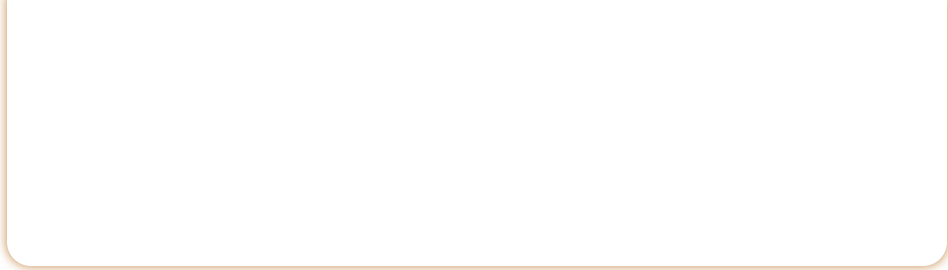
Estate Planning

**Filbrandt Private
Trust**

Investment Management

Filbrandt & Company's unique approach involves managing your retirement accounts and after-tax accounts as a single unit. We organize and simplify clients' financial lives by providing a digital consolidated statement: One Unified Portfolio©.

[Learn More](#)



*"It's not how much money
you make. It's how much you
keep."*

- Michael J. Filbrandt, Chairman of the Board

At Filbrandt & Company, we serve university professors and physicians nationwide—which means we understand your unique financial needs and your goals. If you're like most university professionals, you have uncertainty about the future ahead but little time to learn how to manage your assets. A successful financial plan requires more than a portfolio management strategy. We call our approach comprehensive financial planning, and it may be exactly what you've been looking for. Meet the team behind it.

[Meet Our Team](#)

[Team Update](#)



Educate Yourself

You know the value of ongoing education. Improve your financial and estate planning knowledge with our ever-growing financial and estate planning resource library.

Feb
11

Team Update

Dear Colleagues, Clients and Friends, Our firm continues to thrive and grow thanks to the collaborative efforts of all our Filbrandt Team and our valued clients. As leaders of..

Nov
28

Key Medicare Changes for 2019

Medicare's annual open enrollment period is in progress through Friday, Dec. 7, 2018. It's important for all Medicare-eligible university professionals to be aware of the changes in the government's...

Nov
01

How to Set Up Charitable Contributions for the Long Term

Are you charitably inclined? The most dramatic phenomenon in American charity in the last decade has been the rise of donor-advised funds, according to the Chronicle of Philanthropy. A...

[See All Posts](#)

The Filbrandt Reports

- Market Update: Yield Curve: Recession Imminent?
- Market Update: Market Volatility Isn't All Bad
- Overlooking This Hidden Gem in Your University Retirement Plan?

[➔ See All Filbrandt Reports](#)

Filbrandt Web Classes

Our on-demand web class series is a convenient way to stay informed on critical financial planning topics. Our 3- to 5-minute web class videos analyze current financial issues and events affecting university professionals, and provide impactful strategies professors can implement.

[➔ View Classes On-Demand](#)

Get A Second Opinion **On Your Finances**

Are you on track to achieve your retirement goals? Schedule a complimentary financial review.

[Schedule Your Review](#)

[See Who We Serve](#)

Let's Talk

Questions? If you'd like to speak with somebody from our team, this is where to start.

[Contact Us](#)

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