



Welcome to Oberle Financial Services.

Call today for a free consultation.

952-921-2323

Contact Us

Jeff R. Oberle, Owner

Tax Preparation Specialist

Small Business Consultant

* Registered Representative

* Investment Advisor Representative

Julie Boeser, Sr. Client Associate

QuickBooks Pro Advisor-Desktop and Online

Non-Registered Investment Assistant

Specialty Tax Report Expert

Jody Harmon, Sr. Client Associate

Office Manager

Tax Preparation Technician

Payroll/Sales Tax Specialist

Oberle Financial Services

7900 Xerxes Ave. South Suite #1100 Bloomington, MN 55431

(952) 921-2323

Office Hours

Mon - Fri: 8am - 5pm

Sat: By Appointment

Sunday: Closed

SEND US AN EMAIL

GET DIRECTIONS

Jeffrey R. Oberle, Registered Representative

Check the background of this investment professional at

<http://brokercheck.finra.org/>

About Us

Who We Are

We are a locally owned full service accounting firm dedicated to providing timely tax, accounting and financial consulting services. We have been providing customized personal service for over 30 years to individuals and small businesses with close attention to detail and client privacy.

What We Do

- Tax Preparation for individuals, businesses, trusts, and estates.**
- Accounting services including monthly/quarterly reports, business valuations and small business start-up.**
- Payroll services for small to medium sized businesses.**
- Financial planning and investment advice/sales. ***

Why Trust Us

Local and independent tax experts with over thirty years experience in tax preparation and financial services. We service businesses both large and small as well as individuals with a wide range of net worth. Our goal is to establish a long and mutually beneficial relationship with each and every client.

* Securities and Investment Advisory Services offered through FSC Securities Corporation, member www.FINRA.org / www.SIPC.org . TAX PREPARATION/ACCOUNTING SERVICES offered through OBERLE FINANCIAL SERVICES, INC, which is not affiliated with FSC Securities Corporation. FSC Securities Corporation does not provide tax or legal advice. All other listed entities are unaffiliated.***This communication is strictly intended for individuals residing in the states of AK, AL, AZ, CA, CO, CT, FL, IL, MI, MN, NC, NV, OH, PA, SC, TN, VA and WI. No offers may be made or accepted from any resident outside the specific state(s) referenced. ***IMPORTANT CONSUMER INFORMATION A broker-dealer, investment adviser, BD agent, or IA rep may only transact business in a state if first registered, or is excluded or exempt from state broker/dealer, investment adviser, BD agent, or IA registration requirements as appropriate. Follow-up, individualized responses to persons in a state by such a firm or individual that involve either effecting or attempting to effect transactions in securities, or the rendering of personalized investment advice for compensation, will not be made without first complying with appropriate registration requirements, or an applicable exemption or exclusion. For information concerning the licensing status or disciplinary history of a broker-dealer, investment adviser, BD agent, or IA rep, a consumer should contact his or her state securities law administrator."

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