

# Welcome to Schultz Financial Group Inc. (SFG)

Since 1982, we've provided personal, proactive advice to high-net-worth and family office clients seeking a better life for themselves, their loved ones, and generations yet to come. Today, we proudly serve clients in Northern Nevada and Southern California, as well as various other parts of the country. Our approach puts you front-and-center, so you can steer toward your goals with confidence and clarity.

## WHAT WE CAN OFFER YOU:

- Our approach to managing wealth
- Our innovation in financial planning and investment
- Our culture as a fiduciary fully devoted to clients

## YOUR TRUE WEALTH COMES FROM FOUR CAPITALS

What good is money without the health to enjoy it? The knowledge to protect and grow it? The peace of mind to share it? When you work with SFG, your dreams become as important as your dollars.

Partnering with us may help you to achieve your dreams, so you can do the things that make you happy and fulfilled. We think you'll benefit from our approach, which we call *Integrative Personal Planning*. This approach integrates many aspects of your life into one plan that addresses your four capital needs:

1. Financial
2. Physical
3. Psychological
4. Intellectual

We believe you will benefit from our desire for excellence in serving clients in ways that go far beyond their financial well-being. Over the years, we've helped clients:

- Build houses
- Negotiate contracts
- Arrange medical treatment
- Turn hobbies into post-retirement careers
- Take many other steps toward life goals and aspirations

To maximize your Four Capitals, we work with strategic partners who share our client-centered philosophy, including investment managers and professionals in the fields of real estate, medicine, and psychology.

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# FINANCIAL CAPITAL MANAGEMENT

*"Successful investing is anticipating the anticipations of others." – John Maynard Keynes*

Our Financial Capital Management services are designed to meet the complex needs of individuals and families seeking to preserve, manage, and transfer wealth.

We believe a financial plan requires careful and continual attention to accomplish your specific objectives. From analysis to strategizing, implementation to monitoring, we offer a full range of services that may include: Financial Planning, Investment Management, Family Office, and Real Estate Advisory.

# INTELLECTUAL CAPITAL MANAGEMENT

*"It's not that I'm so smart, it's just that I stay with problems longer." – Albert Einstein*

For those interested, our Intellectual Capital Management services can help:

- Identify a natural second or third career
- Explore options and strategies for starting a business or changing careers
- Determine any additional education needed to achieve life goals and aspirations

# PSYCHOLOGICAL CAPITAL MANAGEMENT

*"Love and work are the cornerstones of our humanness." – Sigmund Freud*

For those interested in our Psychological Capital Management services, we can help:

- Act as a facilitator between spouses to reconcile different perspectives surrounding wealth and investment risk tolerance
- Resolve spending and budget issues that may be jeopardizing your goals
- Navigate any personal roadblocks affecting the preservation and distribution of your estate
- Address issues involving the distribution of assets in a blended family
- Act as a facilitator to address issues involving the distribution of assets in a blended family as well as to address family business dynamics and succession planning

## PHYSICAL CAPITAL MANAGEMENT

*"I told the doctor I broke my leg in two places. He told me to quit going to those places." – Henny Youngman*

We don't have an anti-aging philosophy. Instead, we believe that good health can dramatically improve your quality of life and overall well-being, no matter what your age. For those interested, our Physical Capital Management services can help:

- Provide education and information on health-related topics
- Direct you to professional resources and research on diet, nutrition, and disease prevention

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## SFG Capital News

Insights Into Maximizing Your Four Capitals



## Coming Home for the Summer

Congratulations, you and your child made it through the first year of college! Now, you and your child have another first, coming home for the summer. This is an exciting time in life for your family, one that should be celebrated and enjoyed. Here are some tips to...

[read more](#)



# SFG Library: Psychological Capital Reads

Here at SFG, we support an ongoing educational culture. One of the ways we do this is holding an employee book club meeting several times per year to share about nonfiction books we've read. Additionally, we keep a library of books in our conference room for our...  
[read more](#)

## Join Our Newsletter

Sign up to receive our information-packed newsletter that will help you shape your Four Capitals.

Name

Email

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Where you want to go in life is up to *you*. How to help you get there is up to *us*.

Contact us today to start your journey...

Contact SFG

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The LinkedIn logo, consisting of the letters "in" inside a white circle, is centered on the page.

Where you want to go in life is up to *you*. How to help you get there is up to *us*.

Contact us today to start your journey...

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