

# Wealth Management in the Twin Cities and Southwestern Florida

Ballast Advisors is a fee-based financial planning firm. Our financial advisors serving the Twin Cities and Southwestern Florida can help you reach your retirement and financial goals. Our offices are located in Woodbury, MN, Arden Hills, MN and Punta Gorda, FL.



## Client-Centered Financial Advice

Decisions for financial advice depend highly on the individual and must be built to be flexible with the changes that come along. Some of those might be simple adjustments, others a complete new direction. We value creating strong relationships with our clients. We are dedicated to being responsive and timely and always looking for opportunities for innovation and improvement.



## Comprehensive Financial Planning

The financial services offered by Ballast Advisors reflects our focus on our clients. We're committed to the process of creating a comprehensive financial plan for you, because we think it's the best way to deliver excellent financial advice. We offer the following services:

- Personal Finance Planning
- Investment Management
- Tax Planning
- Estate Planning
- Retirement Planning
- Protection Planning
- Executive Benefits
- Small Business Planning



## Experienced and Dedicated Financial Advisors

We operate in a fiduciary capacity which means we offer you unbiased perspectives and recommendations, searching for not only a suitable solution, but the best solution for your interests and individual needs, doing so with full transparency. We strive to provide you sound financial advice, backed not only by analysis and research, but by life experience and observations that can offer you a balanced and flexible investment portfolio. We value teamwork, take pride in our professionalism, and value the utmost privacy of our clients. [Learn More about our Team](#)



## Schedule your complimentary, no-obligation financial planning consultation today

At Ballast Advisors, our team of specialists and advisors in Minnesota or Florida will work together on your behalf to create a comprehensive plan for your financial goals.

We utilize a personalized approach to financial planning that incorporates income distribution planning, investment management, Social Security planning, health care planning, long-term care planning, estate planning and risk management.




We draw on the extensive experience of our financial professionals to help create a clear, actionable road map in planning for your goals.

The first step in our investment strategy is getting to know our clients- to understand their dreams, goals and create a complete picture of their financial situation.

This comprehensive approach to discovery and assessment is integral to the way we do business. Only when we have a true understanding of a client's needs and goals can the investment process begin. Building on that foundation, we recommend strategies and investments that are in alignment with our client's goals while managing risk.

Schedule your free Financial Planning consultation today!

### Contact Form



<input type="text" value="Name"/>	<input type="text" value="Phone"/>
<input type="text" value="Email"/>	
<input type="text" value="Street Address"/>	
<input type="text" value="Apt, Suite, Bldg. (optional)"/>	
<input type="text" value="City"/>	<input type="text" value="State / Province ,"/>
<input type="text" value="Postal / Zip Code"/>	<input type="text" value="United States of A ▼"/>
<input type="text" value="How did you find ▼"/>	
<input type="text" value="Comments or Questions"/>	

Submit

Are you looking for a certified financial advisor in the Minnesota or Florida area? Fill out the contact form and our team will link you to an advisor in one of our offices in St. Paul, MN, Woodbury, MN or Punta Gorda, FL.



## 5 Tips for Spring Cleaning Your Personal Finances

April 25, 2019

Just like caring for and cleaning your house, regular maintenance on your personal finances will save you loads of time...

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## I'm about to get married. Should I adjust my 401(k) asset allocation?

April 16, 2019

I'm about to get married. Should I adjust the asset allocation in my 401(k) to take my spouse's investments into account? That...

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April 16, 2019

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## Contact Information

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### Ballast Advisors

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Fax Number: 651.200.3119

## Locations

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Woodbury, MN 55125-1705

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### Ballast Advisors – Arden Hills

3820 Cleveland Ave. N, Ste. 500

Arden Hills, MN 55112-3298

Tel: [651.200.3100](tel:651.200.3100)

### Ballast Advisors – Punta Gorda

223 Taylor Street, Suite 1214 (We've Moved!)

Punta Gorda, FL 33950-3901

Tel: [941.621.4015](tel:941.621.4015)



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