Retirement Ready

Mark Kontz, Swenson Wealth Management

Over the years, Mark Kontz has seen retirement planning conversations evolve. Just focusing on investments and getting the highest possible return is not enough when preparing to be retirement ready. People are looking for financial professionals to help them learn about and take advantage of all the opportunities available for maximizing the lifetime benefits of their investment and retirement accounts.

Through workshops, seminars and consultations, Mark helps simplify and articulate the retirement planning concepts that are important to understand. He is very passionate about helping his clients with their retirement planning so they can approach retirement with confidence and peace of mind.

"Our advice and recommendations are tailored to our clients' investment goals, desired return objectives, risk tolerance, time horizon, cash requirements and tax situation."

– Mark Kontz

Peace of Mind is one of the reasons, Mark Kontz, CEO and Founder of Financial Distributors, LLC, merged with Swenson Wealth Management on August 1, 2019. Mark announced the merger to his clients in August saying, "I am pleased to announce my new partnership with Swenson Wealth Management. Swenson's is a

Mark Kontz

locally-owned, independent firm that specializes in financial planning areas that complement the income protection and active money management strategies I have implemented with my clients."

Mark, and the team at Swenson Wealth Management, believe the assurance of a successful retirement is confidence – it's just easier to execute a plan you believe in. Retirement can be a time of great change and uncertainty. Feeling ready and being confident about your retirement can make all the difference.

Finding the Best Outcomes for Clients

"We have found that many financial service professionals focus on products; our experience shows that our clients' needs are best met by focusing on processes and most importantly, people," Mark says. "Swenson Wealth Management uses a network of professionals to help create and execute a personalized plan for each client. Our goal is to find the best outcomes for our clients so they are prepared to face a variety of unforeseen or unexpected events."

"We believe no two investors are alike. In order to help each client meet their financial goals, we have a team-oriented approach to investment management and a client-focused culture that is fundamental to our investment process. Our advice and recommendations are tailored to our clients' investment goals, desired return objectives, risk tolerance, time horizon, cash requirements and tax situation."

"Most importantly, our work together is not over when we have completed the retirement planning process. Our relationships with our clients are ongoing. We care about our clients."

"We take the time to get to know the goals of our clients and help them navigate their financial options to build a retirement strategy that works best for them. Then, as life happens, and needs or goals change, we can make adjustments or add new product selections. We believe in engaging with our clients for their long-term success."

The mission of Swenson Wealth Management is to connect you to a confident financial future and make you retirement ready.

SWENSON WEALTH MANAGEMENT

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