

## BUILDING WEALTH IN OMAHA



### MINDING YOUR BUSINESS

A financial planning and investment advisory firm helps give business owners and executives the care and guidance they need and deserve.

Every day, business owners and executives make important decisions that impact clients, employees, and bottom lines. Yet when it comes to making decisions about their own financial health, these successful individuals might not have the bandwidth or experience to handle it.

Sympathetic to the needs of these clients, Foster Group helps provide the same guidance and wisdom that businesses owners and executives need to care for themselves as they do their own businesses. With two offices—in Omaha and Des Moines—the group is poised to serve these and other high net worth clients in the region with the collective power of its venerated team.

“Our relationships are not transactional—they’re personal,” says Ross Polking,

CFP®, AIF®, MBA, lead advisor of business development at the Omaha office. “We’re all about helping clients avoid costly mistakes as much as we are about helping them make good decisions.”

#### Leading the Way

No matter where a person is starting, the steps leading to retirement are critical and best taken with the steady hand of a financial life advisor. This is especially true for people who are running their own businesses and wondering how much runway is left, and when to jump off.

“We excel at helping business owners think beyond their businesses,” says Polking. “We understand the importance of tax mitigation strategies and can coordinate with

attorneys, CPAs, and other professionals to help take the burden off business owners while eliminating blind spots.” Succession planning, too, is a major concern for business owners, whether they’re starting out or ready to hand over the reins. Helping clients navigate these issues while looking closely at diversification of company-specific risk are among the essential services Foster Group provides. The group also advises on 401(k) and qualified retirement plans for employees and employers.

Executives appreciate just as much guidance but have a few different complexities. With significant assets tied up in their corporations, executives face complex questions around benefit packages, such as various stock options, deferred compensation plans, and disability and life insurance plans. “Benefit plans are often loaded with more information than executives know what to do with,” Polking says. “We’re here to help them sort it out.”

Foster Group also helps ease executives’ transitions to financial independence by relying on an evidence-based investing approach to help grow and preserve wealth, and by helping maximize executive compensation options. These services—along with syncing risk transfer solutions with a client’s lifestyle needs and goals, diversifying company-specific risk, and eliminating conflicts of interest in the process—help ensure pain-free transitions for executives looking to exit.

Foster Group is paid only by its clients and operates with full transparency. It does not promote products or third parties in exchange for a commission, and the group remains unequivocally dedicated to truly caring for the financial lives of its clients. “These people have been grinding it out all their lives, and they’ve earned the right to hire someone like Foster Group,” says Polking. “Peace of mind is invaluable, and we’re here to help provide it.”



Your Financial Life, Truly Cared For<sup>®</sup>

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