lee.
stoerzinger inc
RETIREMENT SPECIALIST

We guide our clients in achieving true independence so they can focus on living out their meaningful purpose.

About Us

Lee Stoerzinger, Inc. has been helping our clients accumulate, preserve and pass on wealth since 1993. Our professional experience, independent approach, and dedication to client relationships, presents a unique opportunity for those looking to build meaningful financial success.

EXPERIENCED

As with most things in life, going into a situation with knowledge and confidence tends to make the outcome much more positive. Many years of providing financial solutions, in-depth understanding of varying markets and economic cycles, and staying educated in a changing industry contribute to the value we bring to each situation. Our focus is converting experience into wisdom for the clients we serve.

INDEPENDENT

Our firm has been independent since the day we opened, in both resources and recommendations made. We represent our clients to the marketplace, and believe objective advice is a primary assumption.

TRUSTED

Money is one of the most personal things in our lives. It influences our families, work, and the choices we make. When people seek a relationship with us, it is trust which is at stake. It is also the foundation of our business.

There is no singular piece, but a blend of attributes which creates the exceptional relationships between our clients and our firm.

Our Process

DISCOVER

We engage both the behavioral and factual sides of investment planning. As emotions can be the root cause of many poor investment decisions, we gain a history of our client's relationship with money, and educate them on how behavior is involved. From there, we proceed to identify the specific objectives needed to create a solid plan.

BUILD

A financial strategy contains two parts; the plan itself and the tools used to get there. Creating the plan is extremely important, and often overlooked. We help implement "roadmaps" which are comprehensive, and apply directly to our client's life. On the investment side, our firm has developed strategic relationships with some of the foremost global money management firms on earth. Believing there is not one successful strategy or firm approach, we control how portfolios are built, and in which economic conditions they are applied.

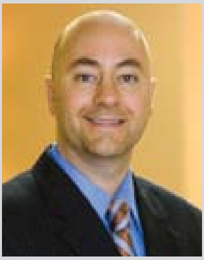
Our firm is built on trust, experience, education & objectivity.

MEASURE RESULTS

Periodically reviewing the client's financial plan is a key piece to ensuring we are on track with reaching their objectives. We actively monitor progress and modify the investments when needed. In the end, we know that the most important investment return is the one which is required to help them achieve success, not the latest headline on the street.

About Lee Stoerzinger

President



Lee Stoerzinger, CFP®, a native of St. Paul, Minnesota, has been practicing wealth management since 1993. After graduating from the University of Wisconsin-Eau Claire with a BA in Cumulative Finance, Lee began his career as an independent financial representative. Since then, he has dedicated his professional life to the study of finance and helping people become financially independent. This challenges his passion for investments and economics, combined with helping people make decisions which shape their futures. Lee is also an active leader in the community where he lives and works, participating in numerous business and nonprofit organizations.

In addition, the company's professional team provides comprehensive support and dedication to our clients, ensuring they receive information and services in a proactive manner, through a truly personal relationship.

Getting Started With Us

The quest to find trusted professionals to help manage retirement and wealth planning can be an overwhelming process. We understand this. Our most rewarding moments are the transformations that take place when prospective clients visit our office for the first time. Uncertainty and even skepticism turns to a sense of security and relief. As questions are answered, pictures of the future are created and relationships are formed.

To begin a discussion with our firm, call to speak with us and inquire how we may be able to help you. Ask for an information packet including a Confidential Profile.

With utmost respect for our clients, we take on a select number of new relationships per year. New clients must have at least $250,000 of investable assets and a strong desire to work together on building a long-term plan.

Who We Serve

While we offer a comprehensive list of services, we have four distinct focus areas:

RETIREMENT INCOME PLANNING

There is much talk about “saving for retirement”, but there is much less expertise in the area of “living in retirement.” It is a time where completely different strategies need to be employed as the transition is made from the accumulation to the distribution phase of life. Lee Stoerzinger, Inc. recognizes this, as we have been providing these solutions for two decades.

LIFE TRANSITIONS

We often think of retirement as one of life’s biggest transitions, but there are many other experiences that give great cause for financial decisions. Whether it’s the death of a spouse, or years of hard work and success being passed to the next generation, these situations can be complex and highly emotional. We understand this and look to bring presence, clarity and solid advice to make the right decisions at the right time.

Our expertise is in helping our clients identify how the pieces of their financial lives fit together.

GENERATIONAL WEALTH

Legacy planning is one of the most complex pieces in financial planning. It involves relationship management as much as it does wealth strategies. Putting together a successful generational wealth plan not only creates a significant feeling of gratification, but it gives true meaning to the word legacy for the family and often the community.

TAX EFFICIENCY PLANNING

Tax planning encompasses many aspects of our lives, from investment to estate analysis. We not only look at the current picture, but how strategies can be developed to minimize taxes payable over generations. Effective tax planning must be proactive and intentional. Working closely with accountants and attorneys, we often take the lead in creating a solid plan.

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SII does not provide tax or legal advice.