

PRIVATE CLIENT SERVICE OFFERING

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WEALTH MANAGEMENT
by BerganKDV



AT YOUR SERVICE

Planning for the future can be complex. Wealth Management by BerganKDV makes complex comprehensible and provides timely and thoughtful advice, coordinating and executing a customized wealth plan so your time and energy is spent on what matters most to you.

MANAGING DREAMS and FEARS

Did you know? In a study of Americans over 50, successful planners achieved an average total net worth three times higher than those who didn't plan? We'll manage that burden with our unique process, principles and partnership.*



FINANCIAL
PLANNING



INVESTMENT
MANAGEMENT



RISK MANAGEMENT
and INSURANCE



TAX STRATEGIES



ESTATE PLANNING

PROVEN PROCESS

You've earned it. Now what? Our process was developed to ensure confidence, comfort and clarity when it comes to your financial future. Our one-on-one approach and thoughtful engagement process is the reason BerganKDV is becoming the provider of choice throughout the Midwest.

CLEAR™

- DISCOVERY
- OPPORTUNITY and RISK
- ANALYSIS and REVIEW
- RESULTS**

A COMPREHENSIVE AND SUSTAINABLE WEALTH PLAN TO ENSURE CONFIDENCE, COMFORT and CLARITY.

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*Source: Lusardi, Annamaria, and Mitchell, Olivia S., "Financial Literacy and Planning: Implications for Retirement Wellbeing," May 2011, page 29. ©2011 by Annamaria Lusardi and Olivia S. Mitchell.



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PROFESSIONAL SERVICES
THE MIDWEST WAY

Investment advisory services and fee-based planning offered through BerganKDV Wealth Management, LLC, an SEC Registered Investment Advisor.