Baskins Hoetger Wealth Management (BHWM) provides wealth management services combining financial planning and investment management. Our specialized focus is retirement income planning for those at or nearing retirement. We provide planning that integrates your investments with retirement income needs, distribution planning, tax reduction strategies, and estate/legacy planning.

In an uncertain world where investment returns are unpredictable, planning is the most important exercise you can do to increase the likelihood that you'll enjoy a rewarding retirement and be able to live the life you want.

Our typical client is generally in their 50's and 60's who understand that the transition into retirement involves some of the biggest financial decisions they will ever need to make. They want to work with experienced professionals who will help them analyze and maximize their retirement income resources. In addition, they prefer to delegate the management of their investments, so they can spend time enjoying the next chapter of their lives.

“I would not give a fig for the simplicity on the near side of complexity, but I would give my right arm for simplicity on the far side of complexity.” *- Oliver Wendell Holmes*

We live in an increasingly complicated world that supplies us with more information than is humanly possible to assimilate, leaving us susceptible to the easy (simplicity on the near side of complexity) solution. Our experience has been that the “easy” answer is seldom the best. At BHWM we will never profess to have all the answers or the only answer, but with forty plus years of experience, we feel well equipped to help our clients navigate through these financial complexities, resulting in an achievable personalized solution.

OUR VISION

- Develop and maintain long-term relationships with our clients and become their trusted lifetime financial advisory team.

OUR MISSION STATEMENT

- To help our clients navigate the complexities of retirement by providing clarity and confidence so that they can enjoy the next chapter of their lives.

OUR VALUE

- We provide objective, personalized advice in order to help our clients make smart, informed decisions about their financial lives and investments.

HOW WE DO THIS

Client Commitment - We are grounded in the belief that our relationship should be based on trust. We will always put your interests first, acting with integrity and honesty. We pride ourselves on the lasting stability and long-term nature of our client relationships, and as a fiduciary, we manage your investments as if they were our own.

Relationship - Your financial and personal goals are important to us. We will listen to you to help you determine your short and long-term financial goals and needs. We maintain honest, respectful communication with our clients to promote mutual understanding and trust.

Excellence - Our team approach has more than 40 years of collective experience and we pride ourselves on providing consistent personal service and unbiased expert advice. We have the knowledge necessary to help guide you through the complexities of today's financial environment in order to make sound financial decisions.

Discipline - We have an unwavering confidence in our investment philosophy and a long-standing tradition of adhering to our discipline. We provide emotional support to help keep you focused on the success of your lifetime financial goals and not on the short-term ups and downs of the markets!