



Wealth is the ability to fully experience life.

Our Services

Developing a professional relationship with an independent financial advisor brings a host of benefits. An advisor can help you articulate your goals, tailor plans that are suitable to your specific needs, and develop long-term strategies to help guide you toward reaching your goals. We offer sound, custom strategies for all your financial planning needs with a broad range of service options, many of which are listed below. Please don't hesitate to contact us when life events occur or any financial needs arise.

- Investment Management
- Financial Planning
 - Retirement Planning
 - Goal Planning
 - Estate Planning
 - Income Planning
 - Education Planning
 - Debt Planning
 - Budget Planning
 - Risk Planning
- Tax Management
- Tax Harvesting
- Tax Considerations on Distributions
- Sequence of Returns
- Family CFO
- Budget
- Investor Behavior Coaching
- Loan Guidance
- Social Security Analysis
- Stock Analysis
- Bond Analysis
- Mutual Fund, ETF and SMA Due Diligence
- Insurance Analysis
- Asset Positioning
- Asset Protection
- Asset Titling
- Asset Transfer
- 1035 Exchanges
- Stock Options
- Executive Benefit
- Newsletter
- Family Financial Structure
- Beneficiary Review
- Hold Accountable to Completing Legal Documents
- Navigating Life Events and the Financial Impacts

Teresa Hart | 708 E. Kay Avenue, Suite 3, Mitchell, SD 57301 | (605) 292 - 0202 | teresa@hartfinancial.net

Sue Benedict | 7304 50th Avenue South, Sabin, MN 56580 | (701) 866 - 1653 | sue@hartfinancial.net

Securities and investment advisory services offered through Osaic Wealth, Inc. member FINRA/SIPC. Osaic Wealth is separately owned and other entities and/or marketing names, products or services referenced here are independent of Osaic. Osaic does not provide tax or legal advice.