

LINDENBERG

Your Partner in Personal Wealth Management



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BLENDING ART & SCIENCE



Financial planning is more than numbers—it's about aligning your financial decisions with your dreams and goals. Following the CFP® standard of care, we specialize in helping individuals and families navigate life's complexities with confidence and clarity. Whether preparing for financial independence throughout retirement, saving for a child's education, managing debt, building wealth, or philanthropic giving, a well-crafted financial plan can make all the difference.

In Partnership,

Chris vonLindenberg

Chris Sherman

Justin Lynam

Jenn Williams

Jen Valentine

Kim Orsetti

Vince Carbonaro

Mysa vonLindenberg

Nicole Gonzon

THE VALUE OF FINANCIAL PLANNING

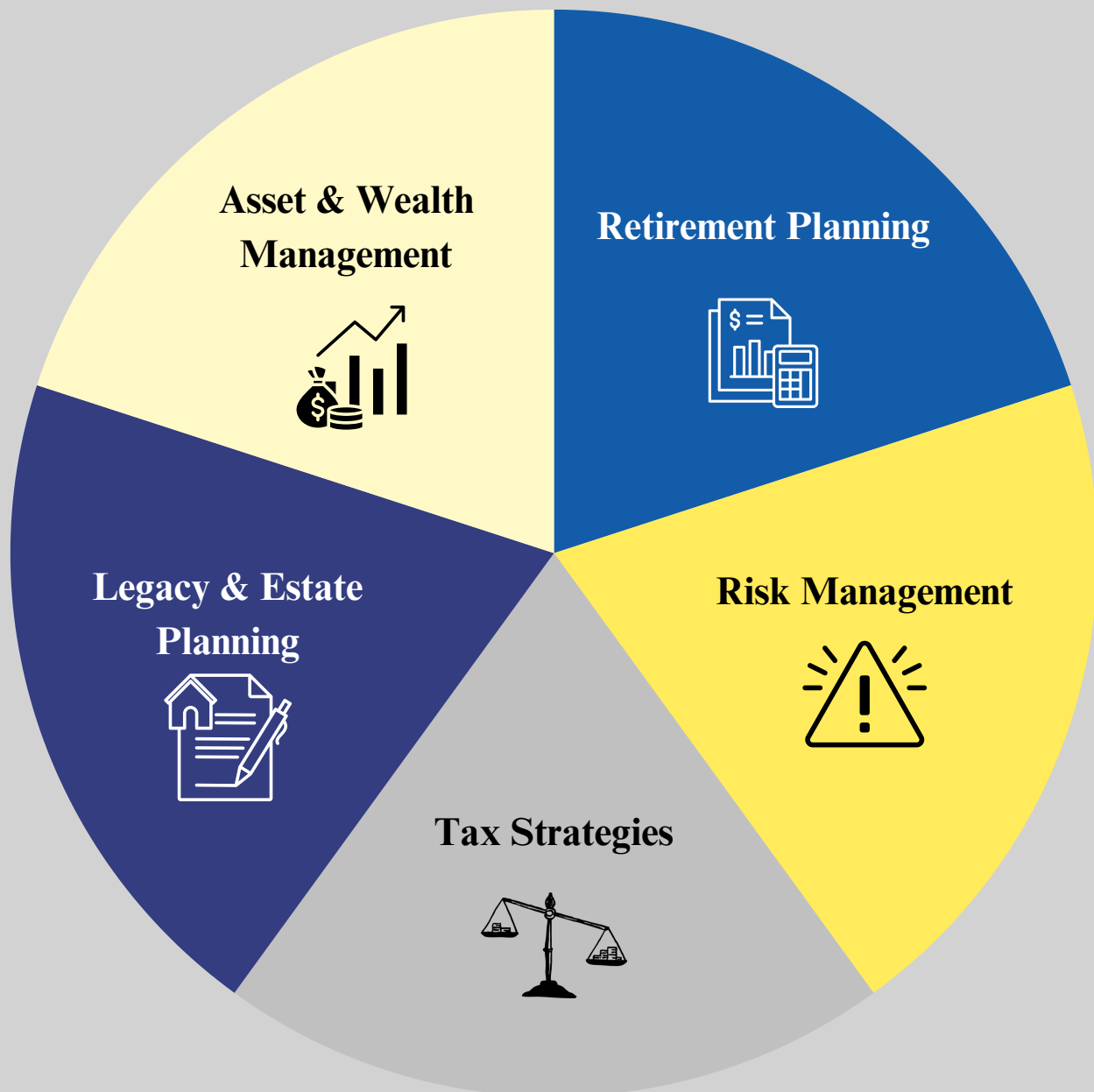
Life is full of financial decisions that require careful consideration. Without a clear plan, it's easy to feel overwhelmed or uncertain about your next steps. Working with a financial planner offers several key benefits:

- Peace of Mind: Knowing that your finances are in order allows you to focus on what matters most: your family, career, and passions. Let us help you create your legacy.
- Objective Advice: Serving as fiduciaries, we provide unbiased guidance tailored to your unique circumstances and priorities.
- Proactive Strategies: Financial planning isn't just about solving problems—it's about preventing them. From tax-efficient investing to retirement readiness, we can help you stay on track.
- Clarity and Direction: Qualified guidance coupled with a financial plan helps you understand where you are today and where you want to go. It creates a roadmap to help achieve your goals.



OUR SERVICES

Our goal is to help you gain the confidence and clarity needed to make informed financial decisions. Our conceptual blend of coaching and economic decision-making allows you to make financial choices with a purpose. We offer comprehensive financial planning services designed to meet the diverse needs of our relationships. These services include:



WHY CHOOSE US?



Personalized Service: We believe no two relationships are alike, which is why we take the time to listen and understand your unique needs.



Fiduciary Responsibility: Lead by a board certified financial professional, we are committed to putting your interests above our own.



Experienced Expertise: Through our experienced team, we have helped clients at all stages of life work toward achieving their goals.



Holistic Approach: Financial planning isn't just about money—it's about aligning your finances with your values and aspirations.

OUR BUSINESS

Lindenberg Financial is a full-service financial management firm dedicated to providing comprehensive financial services. Our clients benefit from having an integrated, collaborative financial team so they can make confident, well-informed decisions. Our holistic approach to financial services allows our clients to consolidate their finances and build meaningful relationships with their advisors.

**Collective Years in
Business**

40

**Households served by
our team:**

758 total

19 states

GETTING STARTED

Financial planning begins with a conversation. During our time together, we will:



Explore and define your financial goals and priorities.

Review your current financial picture..



Identify opportunities and gaps.

Establish a personalized plan to achieve your objectives.



BENEFITS OF FINANCIAL PLANNING

Many of our relationships have achieved significant milestones through financial planning. For example:



Many clients express that they wish they had begun their planning earlier. We are dedicated to empowering future generations by providing education and sharing insights. Our relatable approach enables us to assist others in becoming responsible stewards of their resources. Whether it's establishing a solid financial foundation for purchasing a family home, creating a savings and investment strategy for a child's education, planning for retirement, or preparing for the future needs of a business, we can help. By collaborating and focusing on priorities while managing resources effectively, we seek to reduce risks and speed up the journey toward what truly matters.



Embracing change with confidence... Life transitions occur frequently, often without warning. Whether it's a job change, a retirement offer, the passing of a loved one, or a health diagnosis, we recognize that such changes can bring about uncertainty. As champions for our relationships, we conduct thorough assessments of your current assets and develop diversified investment strategies, which include forecasting future income from Social Security and pensions. Regular progress meetings are designed to offer you peace of mind as you navigate this new chapter in your life.



It's lonely at the top... A small business owner can successfully reduce their tax burden and maximize personal savings through proactive planning. By conducting a thorough analysis of their business cash flow and expenses, we work with their tax team to identify opportunities for deductions and credits, as well as strategies for attracting and retaining key personnel. Additionally, we developed a strategy to build a financial safety net, with the goal of ensuring that their business remains resilient during economic fluctuations.

Meet Your Team

(Visit our website for bios and professional resumes.)



Christopher vonLindenberg
CFP® ChFC® CLU® CFS® RICP® AEP®
CAP® CDFIA®
Founder & CEO



Justin Lynam
Financial Advisor



Vince Carbonaro RICP®
Licensed Assistant



Christopher Sherman
Chief Operations Officer



Jennifer Williams
Director of Client Experience



Kim Orsetti
New Account Administrator



Nicole Gonzon
Administrative Lead



Jennifer Valentine
Relationship Manager



Alyssa vonLindenberg
Marketing Director

OUR CORE VALUES

Compassion

Through active listening, we strive to understand what's important to you.

Communication

The cornerstone of our relationships; when used effectively, builds trust and delivers confidence.



Collaborative Teamwork

Together we can accomplish great things!



To Be Accountable

Do what's right and stand behind our work. All of it.



Fun Relationships

The enjoyment that comes from serving great people, having mutual respect and feeling appreciated.

