Education Minnesota ESI
Financial and retirement planning services

OVERVIEW

Because we are a full-service wealth management firm, our services encompass a full array of options focused on helping you achieve your financial and retirement goals:

- ✓ Financial & Estate Planning
- ✓ Investment Management
- ✓ 403(b) & Pension Assistance
- ✓ Life & Long-term Care Insurance
- ✓ College Planning
- ✓ Insurance Education

PERSONAL FINANCIAL SERVICE OFFERINGS

EFS Advisors personal advisor services take a holistic approach to your financial plan with annual asset rebalancing based on individual and family needs, objectives, and risk profile.

- Analysis of your investment needs, including goals, risk profile, and target timelines
- Initial investment allocations using long-standing strategies
- Assistance with account transfers
- Portfolio design aligned with your goals and objectives
- Portfolio construction with targeted asset allocation; client education
- Online account access at custodian's website
- Portfolio rebalancing to maintain desired asset allocation
- Performance reviews and personal consultations with one of our 40+ licensed advisors
- Virtually unlimited fund options
- Dedicated investment committee, regularly analyzing fund performance
- Technical and disciplined process to money management, while maintaining low-cost strategies

YOUR POTENTIAL, YOUR FUTURE

At the center of our service offerings is a partnership with EFS Advisors. Our dedicated financial advisors will work closely with you to create a customized, goals-based financial plan - and then manage your portfolio to help you reach your goals.

EDUCATION MINNESOTA
ESI
Member Benefits

EFS
ADVISORS
Navigating Your Financial Future