SEATTLE FINANCIAL PROFILE

Income Distribution Experts

Solving the retirement puzzle, from retirement planning to distribution, is Ostlund Wealth Advisors' specialty.

"Some of the smartest people we've met tell us they feel overwhelmed by the 'what-ifs' in life." says Dan Ostlund, CFF®, co-founder of Ostlund Wealth Advisors. "The constant stream of information from the media only makes planning more confusing," adds Marie Ostlund, co-founder. The firm specializes in solving the retirement puzzle for those who rely on their 401(k) investments and those who will receive a defined monthly payment through their pension.

"Decisions made in the years leading up to retirement can make all the difference between enjoying the lifestyle you've worked for or running out of funds too early. For example, those with a pension must specify how they want their funds to be distributed after their death, otherwise heirs may only be able to claim a fraction of the funds, or perhaps none," explains Dan, who has an expertise in pensions. He possesses over 35 years of experience guiding public and education employees through the state and the federal government's confusing pension issues.

In private meetings with families and employers and in popular public workshops, Dan and Marie provide knowledgeable, unbiased advice. They dig deep into issues like securing healthcare in retirement, identifying Social Security strategies, minimizing taxes, protecting against market loss during retirement, and more.

MORE THAN ADVICE

Ostlund Wealth Advisors is an independent branch of Pinkerton Retirement Specialists, named by Forbes as among America's Top Registered Investment Advisory Firms. As independents, the Ostlunds are not limited in what investments or insurance products they can recommend. They develop retirement plans based solely on what's in the best interest of clients and designed to help clients achieve their specific goals.

"We don't simply recommend a plan and leave it to individuals to implement. We provide an extraordinary level of service throughout our client's lifetimes, including through distribution," says Marie, a 25-year veteran of the field. Renowned for her captivating speaking engagements, Marie's expertise is celebrated across the education community, from K-12 to higher education. Her signature seminars, "Retirement Masterclass" and "Women Approaching Retirement and Beyond," are sought after by individuals and organizations alike, while her on-site financial literacy workshops serve as invaluable resources for employers of all sizes.

FIVE GENERATIONS OF SERVICE

Dan and Marie Ostlund have recently been joined in practice by their sons Derek and Alex, both Washington State University Carson College of Business graduates, marking the fifth generation of the Ostlund family to serve the Puget Sound area. Dan's great-grandfather immigrated from Sweden, settling in the region in 1898, and opened a cobbler shop. Dan's grandfather and father both followed in his footsteps in quality shoe repair and sales, solidifying the family's continuing reputation for service.

Derek and Alex's addition to the firm is part of a multi-generation plan—a rarity in the industry. Clients will continue to receive the same Ostlund family brand of service for many decades to come.

35th ANNIVERSARY

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