

# Enthusiastic Support From Prominent Wealth Manager Creates Confident Investors

*KB Financial*

Investor demand for bias-free advice is transforming the financial services industry.

“Increasingly, investors are seeking relationships with financial advisors they can relate to and that they trust are working on their behalf. They want advisors who can give them personal attention and care enough to understand their time horizons, risk tolerances and personal goals. Being one of 500 or more clients isn’t an option for them. At the same time, they don’t want to sacrifice the quality of services and sophisticated solutions historically associated only with global mega firms,” explains Katri K. Balfanz, ChFC®, CDFATM. Katri is a 14-year veteran of the industry who left one of the largest financial services companies in the world to form an independent advisory, KB Financial, in Burnsville, Minnesota.

For Katri’s clients, working with a boutique firm offers the best of all worlds – the hands-on attention of a highly respected professional, outstanding resources that meet the needs of even the most sophisticated investors, and unbiased advice customized to their specific needs. Extensively trained and having earned designations such as Chartered Financial Consultant® (ChFC) and Certified Divorce Financial Analyst (CDFA), Katri has been a Five Star Wealth Manager\* for nine consecutive years. Partnering with Commonwealth Financial Network®, she provides access to a wide variety of investment options and the support of one of the preeminent independent broker/dealers in the United States.

Because KB Financial is independent, Katri’s first priority is the needs of clients, not quarterly sales goals or stockholders’



*Katri K. Balfanz, ChFC®, CDFATM, president of KB Financial, has a nearly 99 percent client retention rate.*

profits. And just as importantly, Katri is extremely selective about those she chooses to work with. “It’s not the size of the portfolio that makes me eager to take on a new client, but the depth of his or her enthusiasm and commitment to worthwhile goals,” she explains. “I become passionate about what drives my clients, and I’m committed to helping them stay on track with their specific goals.”

## Empowering Through Education

Katri prefers to take an educational approach to advising on everything and anything that involves financial decision-making. “Selling just isn’t my priority or focus,” she says. “When I educate clients, they become empowered to make their own intelligent choices.”

For example, Katri expertly guides individuals going through a divorce and in the years ahead. “One client had been trying to finalize a divorce for four years before being referred to me by her attorney. Indecision had unnecessarily driven up costs and kept the family from moving forward,” she says.

The client’s asset balance sheet was complex, with over 25 different personal brokerage and cash accounts along with several businesses. Katri was able to help her analyze it quickly and make the best decision for herself and her children.

“We continue working together now to address transfers, tax ramifications, asset allocation, business planning and estate planning,” says Katri. “It is rewarding to watch as she begins to take the helm of her own financial ship with confidence.”



15270 Branch Circle | Burnsville, MN 55306 | 952-258-9830

[katri@kbfinancials.com](mailto:katri@kbfinancials.com) | [kbfinancials.com](http://kbfinancials.com)

\*Based on 10 objective eligibility and evaluation criteria including: minimum of 5 years as an active credentialed financial professional, favorable regulatory and complaint history, fulfillment of firm’s internal review, accepts new clients, client retention rates, client assets administered, number of client households, education and professional designations. The award is not indicative of the wealth manager’s future performance. For more information please visit [www.fivestarpromotional.com](http://www.fivestarpromotional.com)

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