PROFESSIONAL PROFILE

Paul Staib, CFP®
Principal, Staib Financial Planning, LLC

Business Philosophy

Achieving your financial goals is our highest priority. We have the knowledge, experience and integrity to help you achieve what is most important to you including financial independence, a secure and comfortable retirement, college educations, or whatever your specific financial goals.

Our team of Certified Financial Planners (CFP®) specializes in providing highly personalized financial planning and asset management to better help you and your family meet these goals. We provide the peace of mind that comes with knowing you have entrusted your financial future to a firm that will always place your interests first.

Financial Background

You pay financial professionals for expertise that will help you achieve your financial goals. This expertise comes from three sources: education, experience, and certifications. We have them all and then some. You don't have to ask us if we are experts; we prove it by providing full, written disclosure for all of our credentials. We believe all professionals should document and fully disclose their sources of expertise to allow investors to make informed decisions which results in engaging the professional which best meet their specific needs.

Education	Experience	Certifications
MBA, DePaul University (Finance)	Staib Financial Planning, LLC (since 2003)	CFP®
BS, U. of Dayton (MIS)	15+ Years Business / IT Consulting	NAPFA; FPA

Professional Services

We provide comprehensive financial planning and investment management services which are customized to best meet your unique situation and financial goals. All of our strategies are tailored to provide ongoing financial services that help you achieve your most important goals. Since each financial decision tends to impact others, we encourage you to consult with us regarding all of your needs so we can help you develop and implement a comprehensive and fully integrated solution. As an independent, full-service firm, we provide open architected solutions that do not limit your choices to particular companies or product groups. This means we can select managers that have the highest probability of producing the results you need to achieve your specific goals.

Client Services

A top priority at Staib Financial Planning, LLC is to provide you with personalized quality financial services while keeping you fully informed about your achievement and progress against your financial goals, including your investment portfolio. We provide highly personalized, ongoing contact regardless of your portfolio size including periodic phone calls, face to face meetings, e-mails and quarterly performance reports. Our easy to read reports show you your investment results and any recent activity in your portfolio. We are also available to you on an as needed basis to handle any unforeseen events or questions which arise.

Compensation

Similar to other professionals (CPAs, attorneys, physicians), we are solely compensated with fees for our expertise and knowledge. We do NOT accept commissions or compensation of any kind based on the products we recommend. Because you pay us directly with a fee for our financial planning and investment management advice, we have no conflicts of interest that impact the counsel that you receive from us. Additionally, you are guaranteed complete disclosure of all fees, prior to your engagement. There's no better way to be confident that your advisor is working in your best interest, and solely in your interest.