GUNNESS FINANCIAL SERVICES

Our Approach

At Gunness Financial Services, we approach each client's potential in a focused, individual, and holistic manner. We learn about who you are and what makes you and your situation unique. We strive to develop long-term relationships with our clients so we can discover, understand, and address what matters most to you, now and in the future.

Working in partnership, with mutual respect and ambition, we seek to empower you and help you take ownership of your financial life. Our team will help you define your goals and understand how to move toward them financially. We will meet you where you are in your journey and help you get where you want to be.

Custom Metal Window Screen by Fran Taubman

Understanding Our Clients

We conduct an in-depth interview with prospective clients so that we can understand them as unique individuals and families. And we think hard about our clients so that we can provide insights and advice that are relevant and true. Your whole life can't be described in a chart or a graph, and your financial picture needs to be more than just a data model. At Gunness Financial, our work together begins with a *personal commitment* to family wealth management.

Find out how to start planning with Gunness Financial Services.

SCHEDULE A CONVERSATION

Custom gate by Fran Taubman

Financial Planning

We will focus on you and seek to understand your unique goals, concerns, and circumstances and create a plan that works for you.

Learn More

Investment Management

We work to construct for you — with your input and collaboration — an investment portfolio that seeks to manage your risk/return comfort level.

Learn More

Risk Insurance and Management

We help clients understand and purchase insurance if it makes sense for their situation.

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Small Business Planning

With a trusted partner guiding and supporting you, you can be more capable and confident facing the economic challenges and opportunities of your business.

Learn More

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