

# Greg Burgett



**Greg Burgett**  
**Senior Financial Services Representative**  
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**Financial Advisor**

The Principal Financial Group®

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A financial professional for over 18 years, Greg began his career with Fidelity Investments, Inc. before moving to Wisconsin with his wife, Brenda, in 1997. He has always been passionate about providing outstanding service and investment advice for his clients.

Now, after joining the Principal Financial Group® at the Wisconsin Business Center in 2010, Greg has a renewed sense of helping clients with all of their financial needs. He specializes in helping individuals and small business owners with retirement planning, investment strategies and comprehensive financial plans.

Other strategies include:

- Risk management
- Retirement Income Planning
- Retirement accumulation and controlled estate distribution
- Investment income and reduction of tax liabilities
- Teams with clients other advisors to ensure proper planning

Greg has background and knowledge in these areas of the financial world:

- Retirement accounts-401(k), SEP, SIMPLE, 403(b), IRA, Roth IRA
- Annuities-Fixed/Variable
- Mutual Funds, ETF's, Individual Securities, Option strategies, REIT's, UIT's
- Life Insurance, Disability Insurance and Estate Planning

Greg is an active member and Past-President of The Early Bird Rotary Club of Sheboygan. He is father to twin two-year olds, Charles and Grace.



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