

# Randall J. Roethel, CLU<sup>®</sup>, ChFC<sup>®</sup>



**Randall J. Roethel, CLU<sup>®</sup>, ChFC<sup>®</sup>**  
**Sr. Financial Services Representative,**  
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**Financial Advisor**

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Since 1982, Randall has helped individuals and business owners set and achieve their financial goals. Randall specializes in estate and retirement planning, executive benefits and plans for growing businesses.

Successful strategies include :

- Create compensation plans for key executives and business owners
- Coordination of existing compensation plans with an overall estate planning strategy
- Reduction of estate tax liability
- Comprehensive financial planning
- Ensure maximized retirement savings and controlled estate distribution
- Work with client's advisors to ensure proper planning

Randall's experience separates him from other financial service professionals. He has extensive knowledge of the following:

- Estate Planning
- Business Succession
- Deferred Compensation
  - Top Hat Plans
  - The Executive Nonqualified "Excess" Plan™
- Executive Bonus
- Split Dollar
- Qualified Plans
  - Pensions
  - SIMPLE IRA
  - SEP
  - 401(k)

Randall is a member of the Sheboygan Estate Planning Council, the National Association of Insurance and Financial Advisors, and the Sheboygan Rotary.



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