

Richard C. Kreitz, MBA, LUTCF



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Richard C. Kreitz, MBA, LUTCF is a Financial Services Representative with Principal Life Insurance Company (a member of the Principal Financial Group®) in the Fox River Valley. He has been assisting individuals define and achieve their financial goals for over 15 years. Richard specializes in planning for long-term goals such as Retirement and Education Funding as well as utilizing tax strategies in distribution of assets to you, your heirs or designated beneficiaries.

Strategies other clients have successfully used include:

- Coordinating group benefits from their employer with individual plans.
- Protecting assets against high health care costs.
- Reduction of Estate Tax liability by working with client's other professional advisors.
- Reviewing and changing investment and saving options to increase after-tax income, especially during retirement.
- Establishing and resetting asset allocations to better meet personal goals and risk tolerances.

Richard and the Principal Financial Group team can provide comprehensive solutions regarding:

- Impact of survivorship life insurance benefits on estate concerns, including utilizing trusts to shift ownership.
- Long-Term Care Insurance needs and concerns.
- Company benefit and retirement programs.
- Individual and Group Health Insurance as well as personal Disability Income Insurance.
- Distributions from qualified plans such as SEPs, IRAs, 401(k)s and Pension Plans.

Richard is a member of the National Association of Insurance and Financial Advisors and active with training new representatives. He and his family live in Menasha and are also active with their church and several community service organizations, including serving on their boards.



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