



Founded in 1995, McCarthy Grittinger Financial Group is an independent financial planning and investment advisory firm in Southeastern Wisconsin. We provide our clients with services in key areas of their personal financial lives:

- Financial Planning
- Tax Analysis
- Investment Management

This approach allows us to craft better financial options and deliver more integrated decisions to our clients. Our team includes Certified Financial Planning™ professionals with a deep knowledge of and commitment to their profession. The CFP accreditation is recognized as the highest standard in personal financial planning.

McCarthy Grittinger Financial Group is an independent, fee-only, investment advisory and financial planning firm so there are never any surprises regarding cost of services for value delivered.

We are also a Registered Investment Advisor (RIA), and act solely as fiduciaries to our clients. A fiduciary is someone who has the legal obligation to do what is right for the other person in the relationship – like a lawyer or doctor.

McCarthy Grittinger Financial Group takes pride in keeping you up-to-date and knowledgeable on the critical information you need to navigate through life's transitions. We assign you a lead trusted advisor plus provide you full access to our entire team so that you get the best possible service.

Today McCarthy Grittinger Financial Group serves over 200 clients and we look forward to meeting with you to begin building & protecting your family's financial legacy.

For over 20 years, McCarthy Grittinger Financial Group has provided investment advisory and financial planning services for individuals and families. Our primary, fee-only service provides ongoing investment management for over \$200M in client assets leveraging our proven financial planning approach. In addition, our in-house professionally credentialed advisors consisting of Certified Financial Planning™ professionals and CPAs assist our clients with their tax and retirement planning.

*Registration of an adviser with the SEC does not imply a certain level of skill or training*