

Oswald Financial vs. Principal



We focus on retirement readiness, and we tailor our strategy to meet your needs. Our money coaches sit down with you one-on-one to get the full picture of your situation and goals, so we can guide you through every stage of life's journey. Our goal is to alleviate the pressure and intimidation of money management by making the process easy.

 **Group Education**

 **Online Library**

 **Individual Education Sessions**

 **Enrollment Videos**


Our Commitment to You

We are dedicated to helping you pursue your investment goals by providing personal attention and quality services.

How We Help You

We provide cost-efficient portfolio construction, comprehensive portfolio management, and ongoing discussions to earn your confidence and help you pursue your goals.

- **Understand your goals**
- **Gather information about your situation**
- **Evaluate your situation**
- **Discuss options**
- **Create/implement your plan**
- **Monitor your plan**
- **Discuss updates and observations**

 Retirement Support: 833-224-5660
Medicare Support: 833-684-0433

 info@oswaldfinancial.com



Your main platform for your retirement plan

 800-547-7754  www.principal.com

Services Include:

- Assisting with loan questions/requests
- Providing account statements to employees (paper or paperless)
- Aiding in fund allocation & deferral changes
- Keeping track of individuals' assets in the plan
- Maintaining a website & helps participants with navigation
- Maintaining a toll-free customer service line for plan participants
- Teaming up with Oswald to produce enrollment and education materials