Barth Financial is a comprehensive financial firm that provides specific services to our clients. To help ensure that all receive customized care, we've provided a menu of services tailored to help suit the needs of each individual. For the best fit, it is vital to work with someone who focuses on clients similar to you.

Gary Barth focuses on high net worth individuals, managing unique situations, wealth management, legacy planning, and retirement income planning.

Kristina Hoelting focuses on young to mid-career professionals and small business owners, young families, building wealth, beginning investors, education planning strategies, budgeting and debt elimination.

All Barth Financial clients receive:

- Consolidated online account access via barthfinancial.com
- Educational correspondence
- Periodic review of accounts either in person or remotely
- Prompt phone and email support from office staff
- Invitation to annual client appreciation event
- Custom analysis of risk tolerance
- Goals and objectives review
- Portfolio performance reporting
- Tax and cost-basis reporting strategies

In addition to the services listed above, Silver ($51K-$250K) clients receive:

- Annual account reviews
- Invitation to educational events
- Retirement needs analysis
- Income distribution strategies
- Education planning and funding strategies
- Comprehensive insurance planning
- Investment management agreement

In addition to the services listed above, Gold ($251K-$500K) clients receive:

- Same day response from office staff or an advisor
- Invitation to select social events
- Strategic planning strategies for wealth conservation
- Asset allocation review
- Portfolio rebalancing

In addition to the services listed above, Platinum ($501K-$1m) clients receive:

- Additional in person reviews upon request
- Phone or email response from an advisor within 2 hours
- Invitation to all events
- Net worth analysis
- Income distribution strategies
- Legacy planning strategies

In addition to all services listed above, Diamond ($1m+) clients receive:

- Bi-annual check up calls
- Invitation to all events plus 1 premier Diamond event
- Tax-optimized investing and giving strategies
- Charitable gifting strategies

*Service categories are subject to advisor discretion

**Additional services may be purchased upon request