

Your “Financial Caddie”

Swenson Wealth Management

As someone who enjoys the game of golf, Travis Krueger is passing along that same sense of joy and contentment he gets from the game to his children, Sully and Harlow. Some of the advice Travis gives is very relatable to what he does on a daily basis as president of Swenson Wealth Management, a full service, independent financial planning firm based in Sioux Falls, SD.

On the course, Travis is introducing his children to the fundamentals of golf, offering advice on which club to use, pointing out the hazards and other challenges of the course. He also offers moral and mental support, making suggestions about playing the shot and then offering congratulations or talking them through something that hadn't gone as planned.

As a financial advisor, Travis plays a similar supportive role, providing solid advice by focusing on some basic fundamentals. He looks at each client's strengths and weaknesses, considers their income and assets, debt, long-term goals, desired return objectives, time horizon, insurance needs, cash requirements and tax situations. He takes his knowledge of regulations and market conditions and offers informed advice, helping each client make sound decisions.

“The objective of golf is getting the



Travis Krueger

ball in the hole,” Travis says. “If we don't know where the hole is, we are aiming blindly and may never make it to the final destination. With financial planning, our objective is building a thoughtful plan to achieve our goals—and the important first step is knowing what those goals are.”

Golfers use multiple clubs, each having a different purpose. In wealth management, there are multiple strategies and products that can be used in a portfolio. In order to help each client meet their financial goals, Swenson Wealth Management uses a

network of professionals to help create and execute a personalized plan specific to their individual needs.

Choosing the right tools for the best outcomes

“No two investors are alike,” Travis explains. “Our goal is to choose the tools that will create the best outcomes for our clients so they are prepared for a variety of unforeseen or unexpected hazards or events.”

“Golf is an unpredictable sport,” he adds. “I've had my best day on the course followed by my worst. The same holds true with the financial markets—one day they're up, another day they're down. With proper guidance and planning, a true financial plan can be developed to work towards your objectives but with enough flexibility to weather any storms and unexpected conditions that come up.”

Just as a caddie is a necessity in competitive golf to help navigate a course, a knowledgeable “financial caddie” can help navigate the financial course ahead. “Then as life happens, and needs or goals change, we can make adjustments or add new product selections,” Travis says. “We believe in engaging with our clients for their long-term success.”



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