


FEE-ONLY. NEVER A COMMISSION.

GALECKI
FINANCIAL MANAGEMENT

INTEGRITY

EXPERIENCE

PEACE OF MIND

WELCOME TO WORRY-FREE WEALTH MANAGEMENT

At Galecki Financial Management, we help individuals and families achieve their financial goals.

We pride ourselves on being different. On being anything but a business-as-usual wealth management firm. You'll notice it when you first walk in. We're friendly. We're casual. And most importantly, we listen.

In fact, everything we do is based on what we hear from you, because our experienced team specializes in comprehensive financial planning and advising completely customized to your unique circumstances and objectives.

We help you identify your short- and long-term goals, and we set off together to reach them. It's collaborative. It's relationship-based. And it gets results.

FEE-ONLY. NEVER A COMMISSION.

We're proud to be a Fee-Only wealth management firm, meaning we are only compensated for our time and services. It means that we are always – and only – looking out for your best interests. It means we never receive commissions for selling products, because we believe a commission is more than just a commission – it's a conflict of interest. We don't get paid by anyone but you, because we don't work for anyone but you. At Galecki, our only incentive is to help you succeed.

OUR STORY

After becoming a financial planner in the 1980s, Greg Galecki soon realized the majority of the commission-based industry was operating with an inherent conflict of interest. Over the next few years, the sense that the industry was not operating with the client's best interests in mind continued to grow within him. So he set out to change the industry.

In 1990, he started a financial planning practice within a large CPA firm and moved the practice to a Fee-Only structure two years later – one of the first in Indiana. In 1994, he purchased the practice outright from the CPA firm and went out on his own, creating Galecki Financial Management. Over the years, Greg's client-focused and Fee-Only model attracted both clients and team members who wanted a different, more rewarding kind of wealth management experience. By the time Greg retired in 2021, the Galecki shareholder team had grown to 6 – and the entire Galecki team had grown to more than 15 full-time employees.

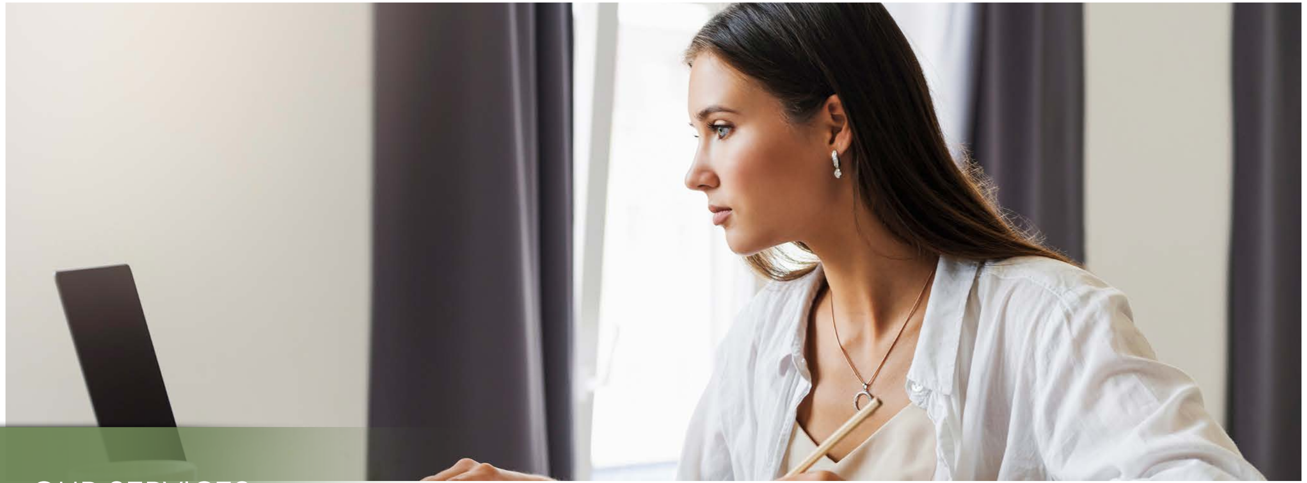
Today, this group of 6 shareholders carries on Greg's vision of always doing what is right for each individual client – because this story is the heart and soul of Galecki Financial Management.

OUR SERVICES

We're proud to be a Fee-Only wealth management firm, meaning we are only compensated for our time and services. And while we pride ourselves on providing a suite of services, everything we do is rooted in our two primary service offerings – Initial Financial Overview and Wealth Management.

INITIAL FINANCIAL OVERVIEW

At Galecki, our well-defined process begins with an Initial Financial Overview. It's not your typical initial consultation where brokers slot you into their menu of products. Rather, it is designed to be a two-hour interactive session during which we review your financial situation and offer recommendations. This is no sales pitch. This is true financial planning.



OUR SERVICES

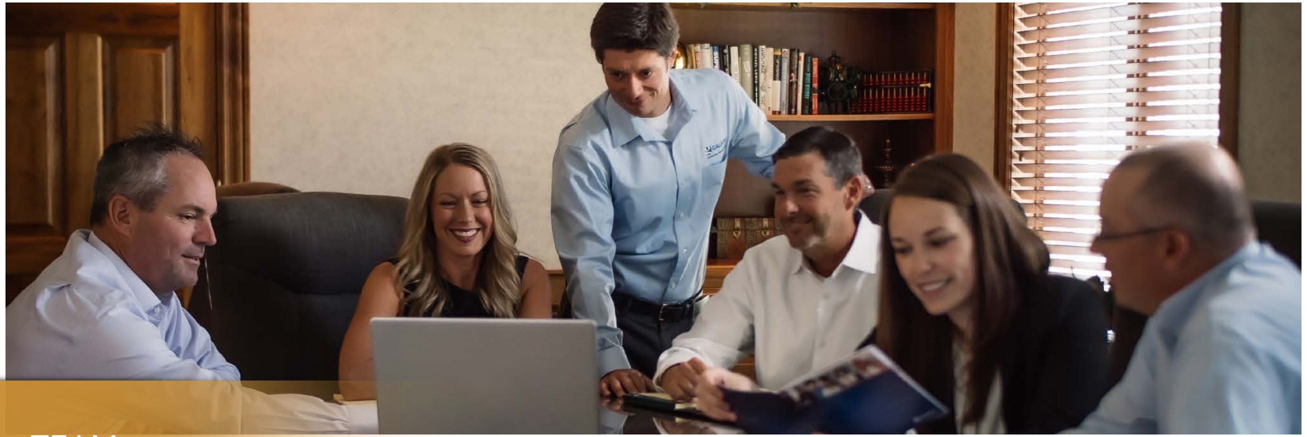
WEALTH MANAGEMENT

Wealth Management is the process of determining where you are, where you're going, and how best to get there.

We customize a financial plan to fit your personal situation, goals and objectives. We begin our relationship with reviewing the various aspects of your financial life, which includes retirement planning, risk management and insurance needs, estate planning, tax planning, education planning, and any other items that impact your plan. As the picture comes into focus, we plot out the most effective and efficient use of your economic resources to ensure you are on track to meet your goals.

We manage your portfolio using a diversified model approach. Our diversified portfolios use no-load mutual funds and ETFs.

Our personalized investment strategies are long-term in nature and encompass your entire financial situation. We adhere to a disciplined course of investing in which our investment committee uses a rigorous screening process to evaluate, select and monitor investments for your managed portfolio.



TEAM

WE'RE MORE THAN A FIRM. WE'RE FAMILY.

Every member of the Galecki team plays a vital role in creating the best client experience possible. Each Shareholder's experience and expertise has played a pivotal role in Galecki becoming the largest Fee-Only wealth management firm in northeast Indiana.

Albert (A.T.) Kohout
CFP®, MBA
Owner / Principal

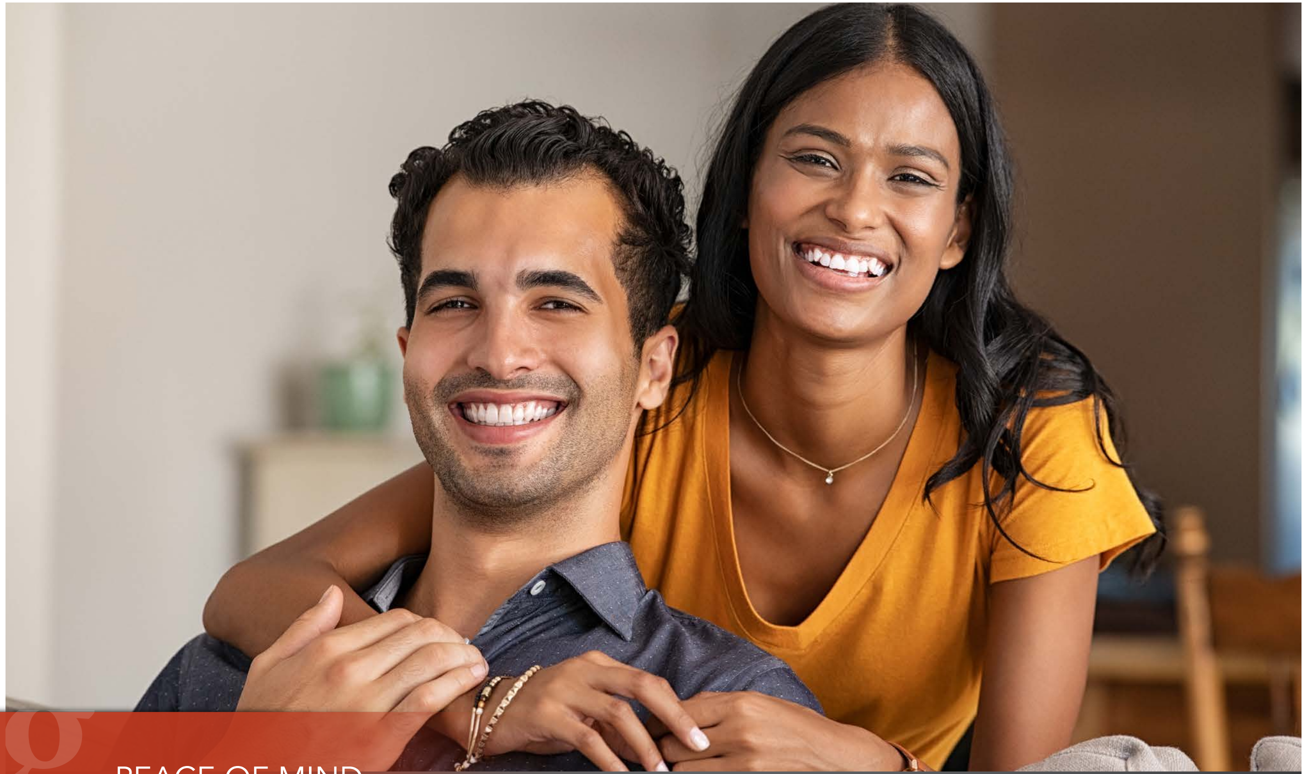
Andrew (Andy) Young
CPA®/PFS, CFP®
Owner / Principal

Brady McArdle
CFP®
Owner / Principal

Chloe Blythe
CFP®
Owner / Principal

Kevin Chandler
CFP®
Owner / Principal

Melanie Colwell
CFP®, CDFA™
Owner / Principal



PEACE OF MIND

WORRY-FREE WEALTH MANAGEMENT IS WAITING

If our personalized, Fee-Only approach sounds right to you, we encourage you to give us a call. Put the Galecki team on your side to help you reach your financial goals.

GALECKI
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