HEISLER HUGHES FINANCIAL GROUP, LLC

Heisler Hughes Financial Group, LLC

An Advocate for Working Families

"Clients choose our firm for the comfort, trust, and understanding they can't get anywhere else." ~Jim Heisler

About James Heisler, CFP®, EA, CDFA™, CASL®

Jim Heisler has spent over 20 years helping working class families and women who have experienced a loss, such as the loss of a spouse or divorce, with financial concerns such as retirement, estate planning, and wealth accumulation. He and his business partner, Kevin Hughes, opened Heisler Hughes Financial Group, LLC in 2015 to give clients a more engaging, consultative experience.

Jim has a variety of advanced training to help his clients meet their needs. He earned a bachelor's degree and MBA from LaSalle University. As a Certified Financial Planner™ professional, he possesses high ethical standards and pledges to always work in the clients' best interest. Jim is also an Enrolled Agent, Certified Divorce Financial Analyst®, and Chartered Advisor for Senior Living®. These specialized designations help him better understand and address the needs of his varied client base. Jim holds FINRA Series 7, 24, and 66 licenses as well as various insurance licenses.

Jim is a member of several professional organizations, including the National Association of Enrolled Agents and the Financial Planning Association®. He serves as a board member and coach of his church's Catholic Youth Organization and previously volunteered with Aid For Friends.

Unbiased, Objective Advice

Heisler Hughes Financial Group, LLC is an independent financial services firm committed to helping individuals and families define and achieve their goals. We believe you can tell a lot about a person based on how they run their business, which is why we've built ours on a set of traditional, American values: positivity, kindness, inspiration, transparency, education, and attainability. Whether you are looking to re-evaluate your current goals or develop new ones, our advisors offer solutions in investment management, retirement income planning, tax preparation, estate planning, and more.

Professional Investment Management

Whatever your situation, a strong financial plan helps you overcome challenges and stay on track to achieve your long-term goals. Heisler Hughes Financial Group believes that successful investment management starts with a deep understanding of each client's risk tolerance, goals, and objectives. We take your investment planning seriously and will be there to guide you every step of the way.

Planning for the Future

You've worked hard to save for retirement and are now enjoying the fruits of your labor, but have you done enough? Having enough money to provide a consistent retirement income is an overwhelming yet pivotal concern of many clients. We help you create a spending strategy to estimate anticipated expenses, identify income sources, and determine a withdrawal strategy well-suited for you. Additionally, our process can include trust and estate planning to help communicate your wishes and protect your loved ones.

Tax Planning

Tax preparation and planning are integral components to any financial plan. We aim to arrange your finances in a way that will minimize your taxes, exploring various tax options in order to determine when, whether, and how to conduct transactions so that your taxes are reduced.

Our Niche

Families – We help blue collar, middle class families with all their financial planning needs. We engage in multi-generational financial planning, working with a number of families across the generations – from you and your spouse to your parents, children, and grandchildren.

Women Experiencing a Loss – Women can face many transitions in a lifetime, with the most difficult to manage being divorce and the loss of a spouse. During these stressful periods, we provide trustworthy support in a professional environment.

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