

## Paladin Partners, LLC Helps Clients Take Control of Their Financial Futures

### Stop Wondering. Start Preparing.

To many readers of a certain age, the name Paladin instantly calls to mind the hero of *Have Gun Will Travel*, a versatile and erudite champion-for-hire with a strong passion for legal principles and the rule of law.

The TV series ended over 40 years ago, but Milwaukee-area investors today have their own Paladin. Paladin Partners, LLC is an independent, fee-only financial planning firm with a passion for helping clients make the best possible financial decisions for their unique needs.

“As a fiduciary, we are legally and ethically bound to a higher standard of responsibility to place clients’ interests ahead of our own,” says Managing Partner William M. Baxter, CFP®, CLU, ChFC®.

#### Paladin: A knightly champion

— Collins English Dictionary  
Complete & Unabridged 10th Edition

Paladin Partners works primarily with professionals, corporate executives, entrepreneurs and their families, helping them make informed choices about investments, tax matters, insurance, estate planning, business succession planning and other financial concerns. The firm often collaborates with clients’ outside professionals and can bring in additional expertise as needed.

“In today’s complex financial world, it is nearly impossible for an individual to put all the pieces together appropriately without specialized knowledge in all these areas,” says Megan L. McCulloch, partner.

**“We take the worry out of wondering if you’re doing the right things with your money.”**

— William M. Baxter  
CFP®, CLU, ChFC®, Managing Partner

#### Personalized Financial Planning

Paladin Partners’ approach to financial planning is highly personal, Baxter says. “Every client is unique, with their own unique values, their own unique set of desired outcomes. And those may change over time. So before we make any recommendations, we devote considerable time to getting to know and understand the client.”

The process begins with a meeting designed to learn as much as possible about the client. The next step is a thorough review of all financial documents, followed by the development of a detailed action plan that addresses every aspect of the client’s financial life, with recommendations to correct any weaknesses.

“We believe all wealth comes from effective management of income resources — unless, of course, you inherit it, marry it or win the lottery,” Baxter explains. “So it’s largely a matter of getting back to basics, of making sure clients are managing their income and expenses in a manner that’s consistent with their goals and objectives. From there, we look at ways to direct the client’s resources to their best advantage and to eliminate any financial friction that may be eroding their capital.”

#### Big-Picture View

As an independent firm with no product affiliations, Paladin Partners has access to an “unlimited vista” of financial products, Baxter says. “This allows us to present the client with the best products for their situation.”

“We spend a great deal of time learning about what’s going on in the market and staying abreast of what



William M. Baxter, CFP®, CLU, ChFC®, managing partner, and Megan L. McCulloch, partner, bring different — and complementary — perspectives to clients’ financial needs.

products are available,” McCulloch adds. “As a result, we feel we’re uniquely qualified to craft outcomes tailored precisely to the client’s wants and needs.” The firm also runs multiple “what if” scenarios, depending on the client’s situation, to identify and plug any gaps.

“At Paladin Partners, we take the big-picture view, working closely with clients to identify the most effective path from where they are to where they want to be,” Baxter says. “We help our clients take control of their financial futures and feel more confident they’re doing the right things with their money.”



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