# Kristy M. Schaffer

*Partner of PrairieView Partners, LLC*
*Certified Financial Planner®*
*Certified Public Accountant*
*Personal Finance Specialist*

Kristy Schaffer's career in public accounting established the discipline to balance the intricate details of financial management with a long-term perspective on the goals of investing. This perspective is a key to the PrairieView commitment to helping manage all aspects of our clients' financial lives, from investing, to tax management, to estate planning.

Kristy earned her undergraduate degree at the University of Redlands, with a double major in Business Administration and International Relations. She completed her graduate work in accounting and earned a Master of Science degree in financial planning before becoming a licensed CPA. Kristy worked in public accounting, focusing primarily on tax compliance for corporate and individual clients. She earned credentials as a Certified Financial Planner® (CFP) and Personal Financial Specialist (PFS), and joined a private investment advisory firm as an investment manager and advisor to high net worth clients. With significant expertise in tax, stock options and alternative compensation planning, Kristy has become a specialist in working with senior executives in a number of large multinational companies. She co-founded PrairieView Partners in 2007.

"Growing up in a small town in Wyoming, I was raised with the idea that personal relationships are at the heart of everything you do. You have to earn others' trust, you have to do the best job you can, and always, without question, you have to do what is right."

## *On working with clients…*

We live in an age that is suffering a de-emphasis on personal service. Most financial service firms are obsessed with improving efficiency and maintaining profit margins through the utilization of technology. They forget the importance of building meaningful, personal relationships with each and every client.

My goal is to provide our clients with the peace of mind that comes from knowing a team of experts is looking after their financial well-being. I want our clients to know and trust the people in our firm, just as we get to know our clients. In the end, our job is to help our clients achieve not only financial goals, but life goals, for themselves, their families, and their communities.

## *An integrated perspective…*

The tools of investing and financial management are truly remarkable. In less than a generation, we've gone from an environment in which only the very wealthy had personal investment advisors (usually called "my broker") to a world in which anyone can open an online account and trade stocks themselves. But one thing that hasn't changed is our need for disciplined, objective, comprehensive, and personal advice. That's harder and harder to come by.

There is nothing more fundamental to an advisory relationship than learning what a client truly hopes to accomplish and then guiding them through the financial opportunities and decisions to make their dreams become a reality. That is what PrairieView Partners is all about.

Ours is a very different approach than most individuals have experienced when dealing with investment professionals. But we pride ourselves on being different. We take the time to learn what is important to each individual and family with whom we work. We work closely with the other professionals on whom our clients rely -- insurance, legal, accounting. We come to understand all of the elements of their financial life in detail, which allows us to do the best job we can. Anything less just wouldn't be right.

## *Education and professional experience…*

I earned my undergraduate degree at the University of Redlands in California, where I graduated summa cum laude with degrees in Business Administration and International Relations. I did graduate work in accounting at Montana State University and earned a Master of Science degree in Financial Planning from the College of Financial Planning.

After passing the licensing exam as a Certified Public Accountant, I worked in the public accounting arena with firms PricewaterhouseCoopers and HLB Tautges Redpath. My practice was primarily in tax planning and compliance for corporate and individual clients. To be better prepared to advise clients on investment strategies, as well as handling the tax consequences of their decisions, I obtained the Certified Financial Planner® and Personal Financial Specialist designations.

I moved to the Midwest to join a private financial planning and wealth advisory firm, where I worked with individuals and families as a senior financial planner and tax advisor. That experience helped shape my commitment to a comprehensive wealth management approach that addresses each client's entire financial picture, from planning to investing to tax management.

I bring a comprehensive and strategic approach to my work with PrairieView Partners. Each of our clients has a unique set of circumstances, resources, tolerance for risk, and long-term goals and ambitions. My job -- our entire team's job -- is to integrate all of those elements into an investment strategy that provides the short- and long-term resources our clients need.

PRAIRIEVIEW PARTNERS LLC

PERSONAL WEALTH MANAGEMENT

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