

**REMOTE OFFICE:**

27296 Cranbrooke Drive  
Lake Forest, CA 92630  
Toll Free: 877.640.6894 ext. 340

**MAIN OFFICE:**

2501 Parmenter Street, Ste. 100A  
Middleton, WI 53562  
Telephone: 608.831.3230  
Fax: 608.831.3235

[katherine.stellflue@goldsteinadvisors.com](mailto:katherine.stellflue@goldsteinadvisors.com)

# Katherine Stellflue

Financial Planner

CFP®, APMA®

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As a financial planner for Goldstein Advisors, Katherine dedicates her time working with clients to ensure they are on the right path towards their goals and dreams while building strong relationships, encompassing every aspect of their lives.

Over 20 years ago, Katherine started as an intern with Jon Goldstein and worked her way up to one of the most successful and top ranked independent practices in the country. She has now made a full circle and is looking forward to being able to have potential for even more growth on a team that genuinely cares about their clients.

Katherine was born at the Holloman Air Force Base in New Mexico. As an Air Force brat, she had moved many times between New Mexico, Arizona, and Wisconsin. She now lives with her husband, son, and a Yorkie named Pancho in Orange County, CA. She obtained her Bachelor of Arts in Business and Leadership from Concordia University in Irvine, CA. She enjoys the outdoors, animals of all kinds, music, exploring new foods and drinks, and volunteering at Working Wardrobes helping people overcome difficult challenges on their way to meaningful employment, including substance abuse, domestic violence, incarceration, homelessness, and military to civilian transition.

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## CA Insurance License 0G70873

### AREAS OF FOCUS

- » Retirement Planning
- » Estate Planning
- » Tax Planning

### PROFESSIONAL DESIGNATIONS & ASSOCIATIONS

- » CERTIFIED FINANCIAL PLANNER™ (CFP®)
- » Accredited Portfolio Management Advisor (APMA®)
- » Real Estate Agent



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