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Katherine Stellflue

Financial Planner

CFP®, APMA®

Katherine currently manages the Orange County, California, branch for Goldstein Advisors, overseeing advanced financial planning, including estate and tax planning, for a small group of high net worth and ultra-high net worth clients. Katherine also coordinates quality controls for the firm.

Over 20 years ago, Katherine started with Goldstein Advisors, but left in 2004 after marrying her husband, Bob, and subsequently moving to California. Katherine completed her BA in Business and Leadership, that she started at Edgewood College in Madison, WI and finished at Concordia University in Irvine, California, in 2005. In addition, Katherine completed her Certified Financial Planner™ designation, had their son, Bobby, obtained her California Real Estate license, and completed her Accredited Portfolio Management AdvisorSM designation.

In California, Katherine worked in one of the most successful and top ranked independent practices in the country, then took advantage of the work from home environment and advances in technology to rejoin Goldstein Advisors in 2020. Managing and advising from a remote office is not a challenge as Katherine often states being born an Air Force brat at Holloman Air Force Base in New Mexico and subsequently moving many times prepared her for anything that comes her way.

Katherine spends her time with the family enjoying the outdoors, animals of all kinds, music, exploring new foods and drinks, and volunteering at her church and other local non-profit organizations. One of Katherine's favorite charities is Working Wardrobes, where they have helped people overcome difficult challenges on their way to meaningful employment, predominantly military to civilian transitions.

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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