

Joseph Pitzl

JOSEPH PITZL, CFP® – MINDFUL ASSET PLANNING

Joe is a CERTIFIED FINANCIAL PLANNER at Mindful Asset Planning in Apple Valley, MN. The term "mindful" means attentive and aware. We work with clients to help them understand their unique money personalities and how these personalities impact their everyday lives. By integrating this into a financial plan, we strive to make our clients more mindful of the financial decisions they make in their lives.

At Mindful Asset Planning, our financial planning process is centered on clarity, flexibility and objectivity. We are a fee-only financial planning firm and do not accept any form of commissions, referral fees, or soft dollars of any kind - our loyalty resides exclusively with the clients we work with. We believe people make the best decisions when they are in a clear and rational state of mind. Because we do not sell products, you will never experience a hard sell and we will never engage in common sales tactics designed to generate excitement, fear, or discomfort. To the contrary, we seek to remove emotion from the process and provide the clarity you need to make smart decisions throughout your financial life.

Joe is a graduate of the University of Wisconsin - Madison with a Bachelor of Science in Personal Finance. He has attained the CERTIFIED FINANCIAL PLANNER™ designation from the CFP® Board of Standards in Denver, CO. He is actively involved in the financial planning community as the President-Elect of NexGen, a national organization representing the next generation of financial planners, and on the Board of Directors of the Financial Planning Association of Minnesota.