

TWIN CITIES FINANCIAL

STAYING ON TRACK

TRUCAIRN ADVISORS GUIDES CLIENTS ALONG THE RIGHT PATH IN AN EVER-CHANGING FINANCIAL LANDSCAPE.



On remote trails worldwide, stacks of stones called “cairns” stand as markers—guideposts for travelers on a journey. The financial professionals at TruCairn Advisors see the humble yet powerfully communicative cairn as the perfect symbol for their mission.

“We are the trail markers for our clients as they navigate a path that’s true to their goals,” says Steven Kumagai, CFP®, CRPC®, Private Wealth Advisor, and Managing Partner at the Twin Cities-area firm that traces its roots back more than 30 years. “We use a holistic financial planning approach that addresses all areas of their financial lives so we can help them achieve their goals. This is important and fulfilling work.”

Harnessing Creativity and Connection

Kumagai recalls one couple in their early 50s eager to retire from their hectic careers as soon as possible. “They figured it would take years, but the more we talked, it became clear that they didn’t want to stop working



TruCairn’s success springs from a four-part approach to strategic wealth management:

Helping clients achieve ultimate goals

Providing holistic advice, not just investment management

Embracing deep, personal relationships and using a multidisciplinary approach

Providing intergenerational planning developed by a multigenerational team

entirely. They just wanted to reinvent themselves, simplify, and be happier.” Kumagai worked with the couple to brainstorm options, and at age 55, the couple “retired” to the mountains where they manage a small home business and live life on their terms.

TruCairn’s experienced, fifteen-person team offers clients personalized service in investments, insurance, charitable giving, executive compensation, educational planning, estate planning strategies, tax strategies, financial strategies for women, life planning, and small business needs. As an Ameriprise private wealth advisory service practice, the firm offers financial services for people at nearly every level of wealth.

But at the end of the day, says Michael Metzger, CFP®, APMA®, BFA™, Private Wealth Advisor, and Managing Partner at the firm, it’s the client-advisor connection that results in successful solutions. He recalls a wealthy couple seeking new ways to think about the art of legacy. “They didn’t want to wait until they were gone for their kids and grandkids to benefit from their estate; they wanted to be a vibrant part of it,” says Metzger. Together, they crafted a financial plan that included regular gifts to their family—and a series of unforgettable vacations. “They regularly send us pictures; it’s so gratifying to see the difference we make,” he adds.

Further proof of the firm’s success can be found in the photographs of far-off cairns sent to them by grateful clients as they travel the world, secure in the knowledge that their TruCairn advisory team is keeping everything on track back at home.



TruCairn Advisors

Ameriprise Private Wealth Advisory Practice

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