

About

Bartt Stevens, AIF®

A Proud Member of



Bartt Stevens is dedicated to providing 3/21 fiduciary services for both Qualified and Non-qualified retirement plans. Bartt understands the needs of employers when offering retirement benefits. He listens closely to plan sponsor needs, and assists with plan design and investment platform benchmarking.



Bartt is a native of Trivoli, Illinois. Graduating with a BS in Economics from Illinois State University, Bartt has worked in the investment industry for nearly 20 years. In 2010 Bartt received certification as an Accredited Investment Fiduciary® after a rigorous study and testing program on fiduciary guidelines and retirement plan ethics. In his spare time Bartt chases his kids to baseball games and gymnastics events, while remaining actively involved in the community.

Our Firm

Witzig Financial Strategies is an independent financial services firm founded in 1998. We are focused on helping clients determine and achieve their financial goals. Because we are not affiliated with any insurance or investment companies, we are truly objective in the advice we give and the products we recommend. We expect your life to change and want to be one of the first to know when it does.

We are committed to providing you with the most accurate market and account information, monitoring your financial progress, and revising your plan as needed. Our professional guidance will help you make suitable financial decisions for you, your family and your business.

Start Planning Today!

Don't wait until tomorrow to start planning for your business' financial needs. To schedule an appointment, I can be reached at (309) 282-6403 or send me an email at bstevens@cirmail.biz.

Services I Provide

Regular Plan Reviews

The DOL requires you to review your plan's performance, investment policy, and plan provisions at least once annually. Let us help you meet these requirements with regularly scheduled review meetings.

Develop and Maintain Investment Policies

The guidelines for your plan selections. We develop a comprehensive policy for your plan and review the plan regularly.

Employee Education

Both on-sight education, and one-on-one advisory services for your employees. Additionally, we provide regularly scheduled education memos for your employees, including timely market and best practices information.

3/21 Fiduciary Services

Let us assist you with your fiduciary duties as it pertains to the investment within your plan.

your **PLAN.**
our **PASSION.**