



# Loeffler Financial Group: A Modern Approach to Wealth Management

**AS I ENTERED** the lobby at Loeffler Financial Group, I was met with a surprising sound and transcendent feeling that transported me directly to South Beach. Douglas Loeffler, the company’s vice president, warmly greeted me. I commented on the interesting, yet refreshing, choice of music. He smiled and told me that it is a freshly mixed playlist from a celebrity DJ friend in Miami. It’s clear that this isn’t your average financial firm.

Our conversation was placed on hold momentarily when Douglas accepts a phone call from a client. The exchange on the phone is surprisingly authentic and honest, a testament to their claim of being a trusted partner that works with clients on a personal level.

Founded by Craig Loeffler in 2001, the business has grown to serve thousands of clients throughout the United States and internationally. Loeffler Financial Group is a full service accounting, bookkeeping, payroll and tax firm that includes wealth management and financial planning for personal and business needs. As Craig sits down for our interview, I can’t help but wonder what he thinks of his son’s music choice.

The exchange between Douglas and his father, Craig, reminds me of mine with my own father. My “modern” ways of thinking are often grounded by my father’s experience and stoicism. This appears to be true of Douglas and Craig. While Douglas manages and maintains the day-to-day operations of the business, Craig focuses on client’s needs for wealth management and financial planning division. Each has their own approach to client relationships and business development, but the two complement one another providing perspective and depth within the company.

When I ask Craig about the origins of his company, he lights up with passion that should be harnessed into a TED talk on how to build a career around what you love. I have to clarify: “We are talking about taxes, right?” He grins, and goes on to explain the transformation from paper to elec-

tronic tax submission with such comprehensive knowledge that I am convinced I never want to file with TurboTax again.

Surprisingly, Craig did not begin his career in finance. Instead, he started as a journeyman machinist whose personal interest in the stock market sparked a desire to learn more about the financial industry. He quickly became a leader in his classes as he sought counsel from those with experience in the field prioritizing work experience over textbook knowledge.

When I asked him how he grew his business from the 16 clients he had in 2001 to the thousands he has today, he replies with a question, “Where do you get your taxes done?” I have to smile at the mere simplicity of the question. Every American pays taxes, and each year the majority of the population cringes when it is time to do so. It’s the perfect conversation starter to introduce the business. However, Loeffler Financial Group is more than that, as it’s grown to a full service wealth management firm.

With tax season upon us, Craig reminisces upon the long hours and hard work it took to get his business to this point. He admits that you have to “think outside the box” and be willing to work from 7 a.m. to 2 a.m. the next day. “We are here for our clients,” Douglas adds citing phone calls he happily answers at any hour of the day. It’s simply part of the personal level of care that comes from Loeffler.

When I finally get a chance to ask Craig about the choice of music, he simply chuckles. Like Instagram stories that reveal the mundane details of our personal lives, Craig seems to simply dismiss the status quo for something that is bigger. It’s not the music or the Loeffler MINI Cooper (both of which are super sweet, by the way) that define his business. It’s Craig’s client-focused mentality infused with a passion for educating and helping people to be independent and financially secure individuals.

[www.loefflerfinancialgroup.com](http://www.loefflerfinancialgroup.com)