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News Release

Kellen Earns Chartered Advisor for Senior Living® (CASL®) Designation

RHINELANDER, WI – Heck Capital Advisors announces that Gary Kellen, ChFC®, CLU®, has earned the Chartered Advisor for Senior Living® (CASL®) professional designation from The American College.

The CASL® program is considered the most robust and comprehensive curriculum available for financial advisors serving the unique financial needs of seniors in retirement and individuals preparing for retirement.

"There is a growing need for financial planners to be highly skilled in meeting the specific needs of a baby boomer market that is at or near retirement," explains David Heck, Chief Operating Officer and Senior Director of Consulting and Planning at Heck Capital Advisors. "Gary has earned many designations throughout his career and the CASL® is another important milestone, giving greater insight into the issues facing seniors and meeting their needs with expert advice on a broad range of financial and lifestyle considerations."

Gary Kellen is the director of retirement and estate planning and vice president of investment planning at Heck Capital Advisors. He began his investment and planning career in 1982 after graduating from St. John's University in Collegeville, Minnesota with a degree in business administration.

In addition to the CASL® Gary earned his Chartered Financial Consultant (ChFC®) designation and the Chartered Life Underwriters (CLU®) designation from the American College. At Heck Capital Advisors, Gary is responsible for providing analysis for Heck Capital clients including personalized cash flow, net worth, and risk/return planning. He also provides retirement analysis and asset allocation reviews and advice on long-term care financing, retirement planning, trusts, financial and estate planning and more.

Candidates for the CASL® designation must complete a minimum of five courses and 10 hours of supervised examinations. They must also fulfill stringent experience and ethics requirements.

About Heck Capital Advisors

Heck Capital Advisors is an independent, top-ranked, family-owned investment management company specializing in portfolio management, consulting and planning. Heck Capital Advisors has client relationships in 31 states, providing investment management and consultation to over $1 billion in assets.