# The Capital Advisory Group, LLC.

www.machtigassociates.com

## *Biography for Zach Engelking*


*"I love knowing that I made a positive difference in each client that I serve."*

Zach Engelking is a Financial Advisor who is focused on helping business owners and individuals with their wealth management. Zach joined Capital Advisory Group after working in the financial industry at Principal Financial, where he has been focusing on employee retirement services and executive benefits.

Using advanced estate planning tools, Capital Advisory Group is a wealth management firm specially designed to meet the needs of business owners and affluent individuals. As part of a team that includes six CPA's, one CLU, two CFP's, one CFA, two JD's and an RIA, The Capital Advisory Group focuses on Fiduciary Responsibilities. By helping clients manage these obligations it allows them to focus on other areas.

Zach has studied Economics and Risk Management at the University of Minnesota. Continuing to learn in these fields has not only helped Zach in financial planning, but he has also enjoys it. Zach currently holds a Series 7 and Series 63 securities license, giving his clients the opportunity grow and diversify their investments. By providing an appropriate asset allocation Zach's clients are able to achieve a more accurate growth while limiting their loss exposure. In addition to being securities licensed, Zach also holds his life and health licenses to provide creative insurance solutions to protect client's assets. Zach's minimum account is $50,000 for new clients, with some exceptions for referrals and flat fee clients.

Born and raised in the Minneapolis/St. Paul area, Zach has been an active member of the community. He enjoys being a Mason and coaching Woodbury Boys Bantam hockey. When he's not working with clients, Zach enjoys time with his girlfriend Tanya, training their two black labs Mitzi and Sable, hunting, or relaxing on the water.