OneTeam Financial, LLC:
A One-Stop Shop for Financial Guidance and Retirement Planning

BY SHANNA O'MARA

Recognizing a void in the financial services industry, three industry specialists from Colts Neck teamed up with a mission to truly help make a difference in the lives of those planning for retirement. CEO Dave Buckwald founded OneTeam Financial, LLC in July 2019 and brought in Managing Partners Drew Serzan and Greg Dillon to begin forming a group of advisors who could provide clients with a wealth of knowledge, ultimately fostering a sense of confidence as they move toward retirement. Together, OneTeam Financial's advisors possess more than 150 years of experience managing client wealth in a wide variety of market environments.

"Drew and I worked together at another firm and shared a unique vision to start our own firm with a group of subject matter specialists focusing on the distribution phase of retirement," Buckwald said. "We saw a big gap in the industry. There were a lot of people who managed money, a lot of people who did insurance, but there were few firms, if any, that really provided everything together in a one-stop shop. We saw a lot of people retiring that, frankly, were in a lot of trouble. We want to fundamentally help people and provide a roadmap to help them pursue their retirement goals."

The team consists of subject matter specialists in Social Security, Medicare, wealth management, employee benefits, disability, long-term care, IRA distribution, tax strategies, fee-based retirement income planning, estate planning and life insurance. Clients are treated to the unique, holistic experience of having this scope of specialty to help serve their comprehensive financial needs. OneTeam Financial is also a member of M Financial Group, one of the most prestigious distribution systems and life producer groups in the country.

"There's a collaborative team behind our clients working to ensure the various components of their financial life are working in concert with each other," Dillon said. "Counterintuitively, things tend to get a lot more complicated from a financial standpoint as you get closer to retirement. You have to consider health insurance, Social Security, what pension option to take. There's a lot of slippage that can occur if all these pieces of the puzzle do not fit together in accord"

OneTeam Financial's goal is to help maximize clients' income, help minimize their taxes and help them protect their families along the way. With life expectancy increasing, the cost of health care rising and tax legislation pending which could further impact individuals' finances, there has been no better time than now to meet with a team of specialists who can help navigate the future.

"It's really about having a process in place that people can get comfortable with because our mission (or goal) is to help pre-retirees plan for their retirement well-being," Dillon said. "Taking them through a process – breaking it down into digestible pieces and not overwhelming them – helps provide a sense of confidence. We want them to be able to not only have a plan in place but to understand that plan. We use concepts that folks who don't do this for a living can understand."

These concepts are defined by those who have dedicated their careers to understanding complex financial challenges and work each day to help others overcome those. OneTeam Financial places tremendous value, time and resources in its staff's continuing education, ensuring that advisors are equipped to give accurate and up-to-date guidance necessary.

Buckwald, who admits he began working in the life insurance industry after letting go of his dream to play professional baseball, has more than 30 years of experience helping clients preserve wealth that has taken a lifetime to accumulate.

Serzan shared that he got into the industry shortly after Sept. 11, 2001 when he saw many families struggle with little to no life insurance planning. Having lost friends during the terrorist attacks, he said that day sparked a "passion to be involved in the business."

Dillon spent years trading fixed income on Wall Street, working with "faceless institutions" before he realized he wanted to move into a career that allowed him to help families and individuals.

"On the journey up the mountain, people are working, saving, accumulating, building that proverbial nest egg," Dillon said. "We want to make sure the journey down the mountain in retirement – we call it the decumulation phase – is the most enjoyable part of the journey."

To learn more about the team and services offered, visit OneTeamFinancial.com or call 844-451-TEAM.

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