KOENIG
Investment Advisory LLC

Koenig Investment Advisory is a boutique wealth management firm offering fee-only investment and financial planning services to families, trusts, and businesses. Located in the small town setting of Medford, Oregon, we bring a personal touch to asset management. We understand each client has unique needs, and we provide custom-tailored solutions based on your specific goals, objectives, and concerns.

We strive to eliminate any conflicts of interest when meeting with a client or prospective client. We operate a fee-only business model so our clients know that when we make a recommendation, it's truly in their best interest. We don't sell products and we don't earn commissions. Our goal is to provide transparency with the solutions we offer. This allows our clients to understand what they own, what services they receive, and exactly what they pay.

When implementing investment solutions, we focus on maximizing inflation adjusted returns, while minimizing down-side risks. Whether your goal is growing your portfolio, or providing income in retirement, we consider your risk tolerance, time horizon, liquidity needs, and current market conditions when crafting a custom-tailored portfolio to meet your needs. Our services can be categorized into two areas:

Investment Management

Research
Allocation
Implementation & Expense
Monitoring

Financial Planning

Retirement Planning
Estate Planning
Tax Strategies
College Planning
Needs Analysis
Employer-Sponsored Plans

Whether you utilize one or all of our services, we use a team-based service model that allows us to draw on the unique skill set of each member of our firm. With combined industry experience of over 50 years, Koenig Investment Advisory provides clients access to unparalleled advice and service. All members of our team are licensed advisors, with Jeff having achieved his CERTIFIED FINANCIAL PLANNER™ certification.

Greg Koenig, owner *greg@koeniginvestment.com*

Greg started Koenig Investment Advisory in 1994 after almost a decade in the industry. He has spent the ensuing years helping clients make prudent financial choices, allowing them to create the futures they desire. His decades of experience gives him a wide knowledge base to draw from when guiding clients through the steps needed to bring their financial goals to fruition.

Jeff McCullough, CFP® *jeff@koeniginvestment.com*

Jeff got his start in the investment industry in 2006 and joined our team in 2014. He is responsible for coordinating all aspects of the finanical planning process, including retirement planning, needs analysis, portfolio development, strategy implementation, monitoring of client accounts, and conducting ongoing reviews.

LorrieAnne Miller *lorrieanne@koeniginvestment.com*

LorrieAnne specializes in back office support and has earned a paraplanner certificate. She makes sure all matters involving opening new accounts, fund transfers, and routine account maintenance are taken care of so that clients do not face bureaucratic obstacles when trying to achieve their goals.