

DIETZENBACH FINANCIAL

2025 In Review

As 2025 comes to a close, we want to wish you and your family a joyful holiday season. It has been a year of meaningful conversations, steady progress, and important planning for many of our clients. We truly appreciate the trust you place in us and remain committed to delivering clear, practical guidance for families, farmers, and business owners throughout the region.

Team Updates

2025 marked an exciting chapter of growth for our advisory team. We're excited to celebrate several major milestones that have strengthened our team and elevated the service we provide to our clients.

This year, Eric Dietzenbach brought a renewed focus and expanded capacity to the practice, strengthening our work in the farm, business, and 401(k) planning space. He completed the AIF® designation as part of his commitment to serving retirement plans and he continues to provide real-world financial guidance and personalized support to the families and businesses we serve.



We also reached a major achievement in-house: our office manager, Ashton Schwickerath officially became a fully licensed financial advisor! Her dedication, hard work, and commitment to professional development have added tremendous value to our team. She continues to support operations while building her own client base, bringing excellent service and strong attention to detail to every aspect of her work.

Meanwhile, Matt Dietzenbach continued to grow his practice, deepening client relationships and helping guide households through another year of financial decisions with clarity and care. His steady leadership and consistent planning work remain foundational to our practice.

We offer a full range of services for individuals, families, farmers, and business owners, including:

- Investment Management & Retirement Planning
 - IRAs, Roth IRAs & 401(k) Rollovers
- Business Retirement Plans (401(k), SIMPLE, SEP, Profit Sharing)
 - Farm Transition & Succession Planning
- Business Owner Planning, Key Person Insurance & Buy-Sell Funding
 - Life, Disability & Long-Term Care Insurance
 - Comprehensive Financial Plans

With good attendance in previous years, we will host our 5th annual "Hello Retirement" seminar in mid March (date TBD) at Pivo Brewery in Calmar. This meeting will be geared towards those who are looking to retire in the next 5-10 years and retirees that are wanting some additional information and guidance on retirement. Watch for our mailer and our Facebook page with a date for the event as we get closer to March.



Outside of work, Matt enjoys helping on the family farm and the occasional round of golf when there is time. His wife, Leigh remains dedicated to the healthcare industry and helping others. At home, they have their hands full with Beckett (8), Calvin (6), Avery (3), and Blake (1). Their kids are just entering the early stages of youth sports and school activities. Matt and Leigh have enjoyed getting involved in the youth sports programs and volunteering at the school. You can say their evenings are lively and weekends are full.

Outside the office, Eric and Andrea stay busy with Cooper (8th grade), Kinley (6th), Cole (4th), and Knox (1st), spending most nights and weekends at a ballfield or gym. Eric enjoys coaching baseball, basketball, and football and embracing the fast-paced –yet rewarding–season of life with four active kids.



Ashton and her husband, Jesse, welcomed their first baby, Callahan, in June. He has brought a wonderful sense of joy and fullness to their days as they embrace this new chapter of parenthood. Ashton and Jesse enjoy taking daily walks with their dog, Miley, now made even sweeter with the addition of a stroller. They also love spending time outdoors and with family whenever they can.

AIF® (Accredited Investment Fiduciary®) is an educational designation only, obtained by the holder by completing the requisite coursework. The AIF Designation does not mean the holder is acting in a fiduciary capacity.

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