

Blue Stone Retirement brings peace of mind

By Katy Yoder
Correspondent

Blue Stone Retirement recently moved their offices from Bend to Sisters. They are offering retirement-planning services and support. President and Founder Nick Stahl says his Central Oregon clients are enjoying the beautiful views along the highway when they come to the new Sisters office on Hood Avenue.

Over the years, Stahl has noticed a common denominator for the people who come into his office or attend one of his seminars: “They don’t know what their retirement plan looks like. They’re asking themselves if they’re going to run out of money or if they’re going to be able to retire. They haven’t run their numbers and have lots of questions. The plan I put together gives them something comprehensive they can see. That can give peace of mind about retirement. They know what next year looks like and beyond. They know they won’t run out of money. They can make smart decisions.”

Most of his clients prefer to meet in person.

“They enjoy the drive out with the great Cascade mountain views,” he said. “They get a meal, walk

around town, and visit their favorite shops. Our Sisters clients can just walk to the office,” he said.

To protect their clients, staff follows COVID-19 safety protocols before and after each visit.

The move to Sisters was precipitated by several considerations: Stahl and his wife live a few miles outside of Sisters and Blue Stone Retirement was outgrowing their Bend office. To accommodate his staff and expansion, he was looking for a larger space. When an office opened up in Sisters, he jumped at the chance to work in a town with Bend’s same community feel but on a smaller scale.

For over a decade, Stahl has been working in the retirement-planning industry. His background in financial services and as a field underwriter for an insurance company positioned him well to serve clients ready to focus on retirement planning. He points out that what he offers is different from an investment planner. He works with his customers to put together a plan that allows their money and investments to be there throughout their later years.

Stahl is one of four people in Oregon with accreditation as a National Social Security

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– Nick Stahl

Advisor.

“That gives us a unique ability to incorporate social security along with pensions, assets, and taxes,” he said. “I put together plans that serve our clients throughout retirement. We do it from a fiduciary standpoint and I appreciate that NISSA holds us to a higher standard of ethics.”

A born teacher, Stahl enjoys offering seminars to folks interested in retirement planning. He started a chapter of the nonprofit American Financial Education Alliance in Central Oregon. Along with being an instructor, he’s currently President of the local chapter of AFEA. He’s pursuing a Master of Science in Financial Services to continue learning and serve his clients through providing the

most current information on planning for retirement.

“The seminars aren’t the usual fare. We help educate and inform people to reduce taxes and build a retirement income plan,” he said.

Stahl sees his company as part of a team effort to support people in their financial planning.

“We aren’t investment advisors, we’re planners putting it all together in one document. To have a well-rounded, strong financial team would include an investment advisor, financial planner, and estate planner,” he said.

Whether he’s doing virtual or in-person seminars, they’re always free and about answering questions aiming for the future people want.

“When you see the look on people’s faces when they look over their plan, we get to see those worries go away. That’s worth it every time,” he smiled.

This year’s schedule for seminars is complete. After they’re done it usually takes Stahl’s team about two months to serve everyone who wants to continue the conversation and learn more about retirement planning. The next education classes begin in January. But between now and then, Stahl invites folks to come



PHOTO PROVIDED

Nick Stahl is president and founder of Blue Stone Retirement, recently moved to Sisters.

by Blue Stone Retirement’s office at 704 Hood Ave., Ste. C. “Most of our business is referrals and we love having walk-ins to the office.

Replacing fear about retirement with a sense of freedom is what Blue Stone Retirement is all about — fears about running out of money or a myriad of other what-ifs about retirement can be assuaged.

“It’s not the final chapter,” said Stahl. “It’s the beginning to a second act.”

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