



Contact Information

William A. Callahan, CFA, CFP®
Callahan Financial Planning Company



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Professional Services	Financial planner, family financial therapist, investment advisor, marriage and family therapist
Practice Approach	Goals-based planning, emotional bias identification, cognitive and decision-making education, written family financial policy
Client Focus	Individuals, couples, and families
Typical Client Profile	Age: 35-65 (average age: 55) Gender: 53% Female, 47% Male Income: \$100,000 - \$1,000,000 Net Worth: \$1,000,000 - \$25,000,000
Licenses/Certifications/Designations	Certified Financial Planner™ practitioner Chartered Financial Analyst charterholder
Education	BSBA, University of Nebraska Omaha MS, Creighton University MBA, Creighton University
Fee Structure	Single annual fee – holistic for ongoing financial planning and other family services
Years in Practice	11
Professional Association Affiliations	Financial Therapy Association Financial Planning Association CFA Institute CFP Board CFA Society of Nebraska
Works with distance clients?	Yes, in-person or online/phone

Personal Statement

How we feel determines our perception and measure of our wealth and well-being. Our practice is centered on improving and maintaining our clients' feelings of wealth, safety, prosperity, and purpose for themselves and their families.

We perform our professional work by identifying your values, goals, and objectives, and establishing planning activities centered around these. We practice via the development of formal family financial policies that help guide big picture decisions for the family's future around spending, income, investment decisions, and more.

In an effort to improve the quality of your decision-making, we also help you understand your behavioral biases, and provide education and research that is aimed at identifying when you make your best decisions, and how you can systematically improve the quality of your decisions in the future.

In doing these things, we additionally gain a comprehensive understanding of your financial situation, including your assets, liabilities, income, insurance, estate plan, and income taxes. We then work to tie your goals and decisions back to your resources to ensure your actions match your goals.