



# SCEDC Testimonial

THE FINANCIAL GROUP, INC.  
SHEBOYGAN, WISCONSIN

- Business plan development
- Acquisition strategies
- Succession planning
- Non-traditional finance



SHEBOYGAN COUNTY  
ECONOMIC DEVELOPMENT  
CORPORATION

DO MORE.

# Financial Planning for a Financial Planner

When Greg Casper found himself positioned to become sole owner of The Financial Group, Inc., he knew it would be advantageous to tap into the expertise of professionals well-connected to the local financial and business network.

“Partnering with the Sheboygan County Economic Development Corporation allowed me to secure the additional financing I needed to acquire the business. They connected me to resources available through the City of Sheboygan and provided connections that were very helpful,” said Casper, a Sheboygan native and University of Wisconsin – Madison graduate.

In 2014, Casper moved from Madison back to his hometown to partner with The Financial Group, Inc. The owner handpicked Casper as a successor. Casper had partial ownership, but needed an economic solution to help finance complete acquisition of the business, which provides services to its clients with the best total solution in view of their retirement, insurance, and investment goals and objectives.

Jim Schuessler, Business Development Manager, Sheboygan County Economic Development Corporation (SCEDC), worked with Casper to develop a business plan narrative. He also connected him to Chuck Brys, Senior Business Consultant of the Small Business Development Center at the University of Wisconsin – Green Bay, who prepared a detailed set of financials and provided information on trends and projected expectations for the firm.

To address the financing gap, Schuessler helped coordinate a subordinated loan through the City of Sheboygan’s revolving loan fund. Senior lending for the project was provided by Investors Bank.

Today, Casper owns 100 percent of The Financial Group and is a strong advocate for SCEDC’s entrepreneurial services.

“The SCEDC is a great resource that I’ve already encouraged other business owners to look into,” Casper said. “Their services help everyone on a whole—from businesses to the workforce to the community—to ultimately improve the economy in Sheboygan County.”



“ Partnering with the Sheboygan County Economic Development Corporation allowed me to secure the additional financing I needed... and provided connections that were very helpful. ”

Greg Casper, Owner  
The Financial Group, Inc.



**SHEBOYGAN COUNTY**  
**ECONOMIC DEVELOPMENT**  
CORPORATION  
DO MORE.

508 New York Avenue - Room 209  
Sheboygan, WI 53081

920-452-2479  
info@SheboyganCountyEDC.com  
SheboyganCountyEDC.com