



Chamber Business Profile

Fitzpatrick Financial Services, Inc.

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When Brian Fitzpatrick opened Fitzpatrick Financial Services in August 2012, he was not chasing a sales target or building toward a corporate ladder. He was building something more personal for the customers he wanted to help. Sitting around the desk today with his wife and son, the business revolves around a simple idea that has guided it from the start: help people make decisions about their money the same way you would want someone to help your own family.

From its Oskaloosa office, Fitzpatrick Financial Services focuses primarily on investment planning, with a strong emphasis on helping individuals prepare for and live through retirement. Brian Fitzpatrick, branch manager and financial advisor, said much of their work involves guiding clients through major transitions, such as rolling over retirement accounts after leaving an employer.

“Everybody’s different, so we customize something that fits their situation,” he said. “We’re just trying to structure for each individual, balancing risk versus reward.”

While many clients are nearing retirement, the firm also makes a point to welcome younger individuals just beginning to build financial stability. That range, Brian said, keeps the work grounded in real-life stages, from first jobs to long-term planning.

The business itself grew out of decades of experience. Brian began his career in finance after graduating from Iowa State University in 1983, working as a loan officer and later as a city finance officer. His interest in investing eventually led him to become licensed in 2003 and open his own independent advisory practice.

That independence remains central to how the business operates today. While utilizing brokerage firm Raymond James for back-end services, Fitzpatrick Financial Services maintains control over how it serves clients.

“We’re not employees of a corporation,” Brian said. “We’re our own independent business, and that gives us the flexibility to focus on what we think is best for the people we work with.”

The decision to move the business to Oskaloosa in 2013 was rooted in something just as practical: home and community. Both Brian and his wife, Sherry, have deep ties to the area.

“It’s familiarity,” said Sherry Fitzpatrick, office manager. “It’s a small town, but it still has the conveniences we need. Not too big, not too small.”

That sense of place carries into the way the office operates. The team, which includes Brian and his son Kevin as financial advisors, keeps the environment intentionally approachable.

“We’re pretty casual, and we enjoy that,” Brian said. “We just talk straight with folks.”

Kevin Fitzpatrick joined the firm in 2022, bringing a different perspective shaped by a background in journalism and marketing. He now contributes to client communication, including writing a monthly newsletter and helping maintain the firm’s outreach.

“My degree was in journalism, so I still get to utilize those skills,” Kevin said. “We aim to communicate regularly with clients and keep them informed.”

Sherry’s role has also evolved over time, particularly as the industry shifted toward digital operations.

“I used to handle all the paperwork,” she said. “Now that we’re mostly paperless, I focus more on bookkeeping, office operations, and making sure everything we do meets compliance standards.”

Together, the three operate a business that is as much about relationships as it is about financial strategy. Brian said that trust is the most consistent feedback they hear from clients.

“That’s the first word that comes to mind,” he said. “People trust us. They know we’re going to be honest with them.”

That trust has been built over time, often through challenging moments. Brian recalls starting the business during a period that included the 2008 financial crisis, when markets dropped sharply, and uncertainty was high.

“It was a difficult time in many people’s lives, but it was a good experience to help clients through it. Now, when faced with market corrections or uncertainty, we’re able to offer perspectives gained from our time in the business.”

Kevin added that working directly with people’s finances requires more than technical knowledge.

“You’re dealing with people’s money, which can often involve emotions just as much as it involves making decisions on investments or providing education,” he said.

Beyond their office, the team has expanded its reach through partnerships, including a long-standing networking agreement with First State Bank, which has multiple locations across the region. This allows them to serve additional clients while maintaining their independent structure. That relationship, Brian said, has played a significant role in the firm’s steady growth.

Looking ahead, the goal for Fitzpatrick Financial Services is not rapid expansion or aggressive marketing. Instead, the focus remains on steady growth, continuity, and family. With Kevin now part of the business and a new generation already growing up around it, the long-term vision feels both practical and personal. “We’re just here to help people,” Brian said. “If you do that right, everything else tends to take care of itself.”

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