

Meet Our Team



James M. Jacobs, CLU®, ChFC®, CLTC
Founding Partner/
Retirement Specialist



Andrew S. Jacobs, ChFC®, AIF®, CLTC
Senior Partner/Wealth
Management Advisor



David M. Jacobs, CFP®, AIF®, CPFA®, CLTC
Senior Partner/Wealth
Management Advisor



Aaron Zimmer, CFP®
Wealth Management
Advisor



Tyler Walz
Wealth Management
Advisor

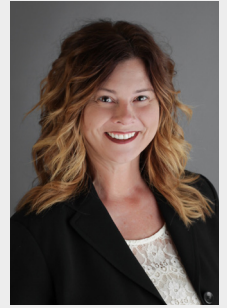


Nolan Lind
Wealth Management
Advisor

Our Support Team



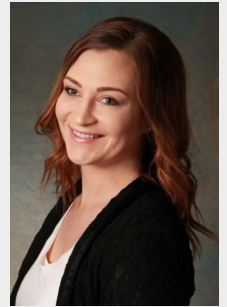
Jody Reese
Client Services
Representative



Anita Lindholm
Practice
Coordinator

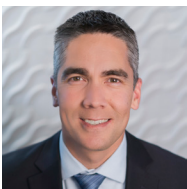


Ingrid Pederson
Administrative
Assistant



Megan Walford
Administrative
Assistant

Resource Team



Jeff Landt, CFA, CFP®
Vice President and
Director of Investments



Carrie Hancock, CLU, ChFC
Director of Financial
Planning



Chris Sitek, CLTC, CASL™, CLU, ChFC, RHU, REBC
Vice President of Life
Business Development



Chase Brakke
National Disability
Insurance Specialist



Heather Scharnberg
Employee Benefits
Division Manager



Jim Babusek
Director of Property
and Casualty,
Borealis Insurance
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Chris Abbott
Founding Partner/
Independent Agent of
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Supplement Division

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*Source: The American College