

## 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®, AIF®**  
Wealth Management  
Advisor



**Tyler Walz**  
Wealth Management  
Advisor

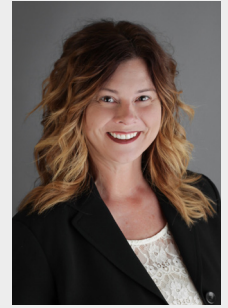


**Nolan Lind**  
Wealth Management  
Advisor

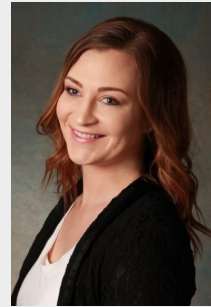
## Our Support Team



**Jody Reese**  
Client Services  
Representative



**Anita Lindholm**  
Practice  
Coordinator for  
David M. Jacobs



**Megan Walford**  
Administrative  
Assistant



**Marissa Bjerkness**  
Practice  
Coordinator for  
Andrew S. Jacobs

## 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 Consultant



**Heather Scharnberg**  
Employee Benefits  
Division Manager



**Jim Babusek**  
Director of Property  
and Casualty



**Chris Abbott**  
Founding Partner/  
Independent Agent of  
North Star Medicare  
Supplement Division

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\*Source: The American College