



Professional Focus

- Provides investment advice for clients as an Investment Advisor Representative of Boulay Financial Advisors, LLC a Registered Representative of 1st Global Capital Corp.
- Assists clients with a variety of financial services which include investments, money management, estate planning, income tax planning and preparation, insurance needs, and debt management
- Specializes in managing clients' money to help them meet their needs and comfort levels
- Assists businesses and individuals in defining and achieving their financial goals and objectives

Professional Experience

- Over 25 years of experience in wealth management, taxation and management consulting
- Joined Boulay, Heutmaker, Zibell & Co. P.L.L.P. in 1999
- Prior experience includes 12 years in public accounting and five years in private industry

Education

- University of Wisconsin, Stevens Point
B.S. Accounting
- University of St. Thomas
MBA, Finance
- Institute of Management Accountants
Certified Management Accountant
- Series 7 and 66 Licensed
- Certified Financial Planner™

Professional Activities

- American Institute of Certified Public Accountants
- Minnesota Society of Certified Public Accountants
- Institute of Management Accountants
- Financial Planning Association of Minnesota

Securities offered through 1st Global Capital Corp., Member FINRA, SIPC. Investment Advisory services offered through Investment Advisor representatives of Boulay Financial Advisors, LLC. Boulay Financial Advisors, LLC is not affiliated with 1st Global Capital Corp