



Your Advisor Team



Tim Stoller, AAMS[®], AIF[®], CRPS[®] PRESIDENT & FINANCIAL ADVISOR | VAN WERT, OH

- Responsibilities include company direction, business development, client service
- In the Financial Services Industry since 2000
- Accredited Asset Management Specialist (SM), Accredited Investment Fiduciary (SM), and Chartered Retirement
- Plan Specialist (SM)
- Business Administration; Ohio State University

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Tamela Sperr, CFP[®] FINANCIAL ADVISOR & PARTNER | MORRIS, MN

- Responsibilities include business development, client service
- In the Financial Services Industry since 1994
- Certified Financial Planner (CFP)[™]
- Business Economics; University of Minnesota

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Graig Stettner, CFA[®], CMT[®] FINANCIAL ADVISOR & PARTNER | FORT WAYNE, IN

- Responsibilities include investment strategy, client service
- In the Financial Services Industry since 1994
- Chartered Financial Analyst (CFA) and Chartered Market Technician (CMT)
- Business Administration; Indiana University

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Jordan Arnold, CFP[®] FINANCIAL ADVISOR | BLUFFTON, IN

- Financial Advisor in Bluffton, Indiana
- Responsibilities include general advising and client service
- In the Financial Services Industry since 2013
- Finance; Indiana Wesleyan University

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Your Advisor Team



Seth Gerber, CPFA® FINANCIAL ADVISOR | FORT WAYNE, IN

- Client Services Associate in Van Wert and Fort Wayne offices
- Accounting, Finance; Indiana University
- Experience in areas of accounting and human resources

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Matt Dorweiler FINANCIAL ADVISOR | MORRIS, MN

- Financial Advisor in Morris, MN
- Specializes in risk management
- In the Financial Services since 2006
- Business; Bethel University

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CJ Reed FINANCIAL ADVISOR | VAN WERT, OH

- Financial Advisor in Van Wert, OH
- Quantitative Finance, Economics, Math; James Madison University
- Holds Series 7 and 66 with LPL Financial and Strategence Capital

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Erin Gilbert FINANCIAL ADVISOR | VAN WERT, OH

- Financial Advisor in Van Wert, OH
- In the Financial Services Industry since 2005
- International Business College
- Holds Series 7 and 66 with LPL Financial and 66 with Strategence Capital

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Your Advisor Team



Erin Laukhuf FINANCIAL ADVISOR | VAN WERT, OH

- Financial Advisor in Van Wert, OH
- In the Financial Services Industry since 2007
- Finance and Marketing; Manchester College
- Holds Series 7, 24, 63, 53 with LPL and 66 with LPL and Strategence Capital

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Your Service Staff



Kirsten Demarais ADMINISTRATIVE ASSISTANT | VAN WERT, OH

- Administrative Assistant in Van Wert, OH
- Career in office administration and management

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Janet Evink ADMINISTRATIVE ASSISTANT | MORRIS, MN

- Office Manager in Morris, MN
- In the Financial Services Industry since 2003

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Shannon Gebert ADMINISTRATIVE ASSISTANT | VAN WERT, OH

- Administrative Assistant in Van Wert, OH
- In the Financial Services Industry since 2005 with a focus on customer service

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Your Service Staff



Cindy Grubaugh ADMINISTRATIVE ASSISTANT | VAN WERT, OH

- Administrative Assistant in Van Wert, OH
- Career spent in finance and accounting with an emphasis on customer service

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Sandi Shutt CLIENT SERVICES ASSOCIATE | VAN WERT, OH

- Client Services Associate In Van Wert, OH
- In the Financial Services Industry since 1994
- Business Administration; University of Northwestern Ohio

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Julie Reiff ADMINISTRATIVE ASSISTANT | BLUFFTON, IN

- Administrative Assistant in Bluffton, IN
- 30+ years of experience in banking and customer service

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Ella Edelman ADMINISTRATIVE ASSISTANT

- Administrative Assistant
- English, Spanish; Indiana University Fort Wayne

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