

Your Advisor Team

Tim Stoller, AAMS, CRPS



- President; Financial Advisor
- Responsibilities include company direction, business development, client service
- In the Financial Services Industry since 2000
- Accredited Asset Management Specialist (SM), and Chartered Retirement Plan Specialist (SM)
- Business Administration; Ohio State University
- Outside Activities include: Gideons; LifeWise Academy

Graig Stettner, CFA, CMT



- Partner; Financial Advisor
- 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
- Serves on the board of the Fort Wayne Air Show

Tamela Sperr, CFP



- Partner; Financial Advisor in Morris, Minnesota
- Responsibilities include business development, client service
- In the Financial Services Industry since 1994
- Holds the Certified Financial Planner (CFP)[™] designation
- Business Economics; University of Minnesota
- Serves on the board of St. Francis Health Services

Your Service Staff in Van Wert



Erin Gilbert

- Financial Representative
- In the Financial Services Industry since 2005
- International Business College



Erin Laukhuf

- Financial Representative
- In the Financial Services Industry since 2007
- Finance and Marketing; Manchester College



Sandi Shutt

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



Laura Dunno

- Sr. Administrative Assistant
- In the Financial Services Industry since 1982
- James A Rhodes College



Shannon Gebert

- Administrative Assistant
- In the Financial Services Industry since 2005 with a focus on customer service

Your Service Staff in Fort Wayne



Ella Stettner

- Administrative Assistant
- English student at Purdue University Fort Wayne

Your Service Staff in Morris



Janet Evink

- Office Manager
- In the Financial Services Industry since 2003