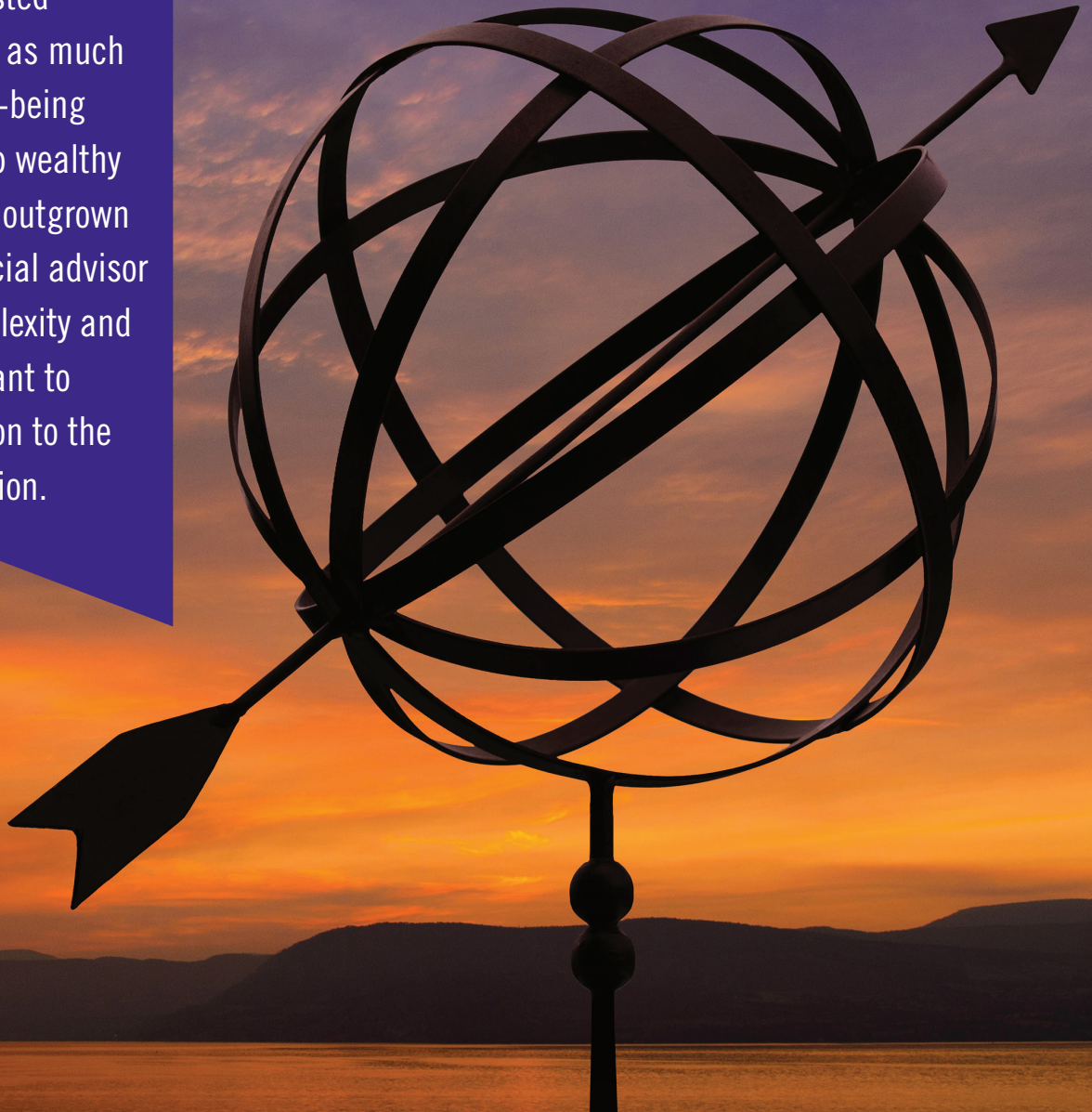


— THE —
PARR McKNIGHT
WEALTH MANAGEMENT GROUP

CLARITY. CONFIDENCE. STRUCTURE.

We are a trusted partner who cares as much about your well-being as you do. We help wealthy families who have outgrown their previous financial advisor or are facing complexity and values they want to simplify or pass on to the next generation.



LET'S GET TOGETHER TO ACHIEVE...

CLARITY. Get your arms around all your financial affairs. It is also the capacity to see your situation in fresh and revealing ways and to identify issues often overlooked.

CONFIDENCE. Know that you have a plan in place and that you are on track in pursuit of your life's goals.

STRUCTURE. Have your financial affairs thoughtfully and thoroughly organized, guided by a highly-trained and qualified team of professionals.



KUDOS!

Our team has once again earned distinction as one of the 2024 Forbes Best-in-State Wealth Management Teams, securing an impressive #5 ranking among countless other teams.

Our journey of innovation and growth has led to numerous prestigious Forbes awards, a testament to our unwavering commitment to excellence. These accolades, while humbling, underscore the impact of our team's dedication to pushing boundaries and consistently delivering value to our clients. We are grateful for the recognition and view these awards not as a final destination, but as milestones in an ongoing pursuit of innovation.

As we proudly display our Forbes honors, we remain focused on continuous improvement. We specialize our approach to multi-generational family planning and stay true to our mission of providing unparalleled solutions with humility and gratitude for the trust our clients place in us.

THE **PARR McKNIGHT** WEALTH MANAGEMENT GROUP

CLARITY. CONFIDENCE. STRUCTURE.

Forbes
BEST-IN-STATE
WEALTH MANAGEMENT TEAMS 2024

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Forbes
BEST-IN-STATE
WEALTH ADVISORS 2023

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as one of the Best-in-State Wealth Advisors*:
Tony Parr, Partner, in 2020, 2021, 2022 and 2023;

Forbes
BEST-IN-STATE
WEALTH ADVISORS 2023

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Brian McKnight, Partner, in 2021, 2022 and 2023;

Forbes
BEST-IN-STATE
TOP NEXT-GEN
WEALTH ADVISORS 2023

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and Best-in-State Top Next-Gen Wealth Advisors*:
John Rudi, Partner, in 2022 and 2023.

WHAT WE DO

WE ADDRESS THE 10 CRITICAL WEALTH MANAGEMENT CONCEPTS:

1. FAMILY FINANCIAL OVERVIEW AND DEVELOPING YOUR PLAN

Clarify Family Values, Goals and Objectives

Assemble Consolidated Financial Statements

Identify and Triage Financial Priorities

Implement eMoney Plan

2. WEALTH AND INVESTMENT MANAGEMENT

Customized Portfolio Solutions

Alternative Income Strategies

Indexed and Tax-Managed Solutions

Individual Equity Strategies

3. PERSONAL BANKING / LIABILITY MANAGEMENT

Liability Analysis and Optimization

Through Wells Fargo Affiliates, You Have Access to Banking Services, Including: Securities-Based Lending and Residential Mortgages

4. CORPORATE BENEFITS AND RETIREMENT PLANS

Managing and Understanding Corporate Benefits

Optimizing Savings Plans and Pension Elections

Annual Enrollment Support

Cash Flow Modeling and Sensitivity Analysis

5. CONCIERGE (VIP) EXECUTIVE SERVICES

Concentrated Equity Strategies

10b5-1 Trading Plans

Stock Option and RSU Analysis

IOU Stock Analysis

6. RETIREMENT INCOME PLANNING

Design Tax Efficient Streams of Income

Incorporate Lifecycle Spending Strategies

RMD, Social Security and Medicare Planning Strategies

Forecast/Develop Spending Plan

7. INSURANCE AND ASSET PROTECTION

Insurance Advice: Life and Disability

Needs Analysis and Policy Reviews

Extended Care Planning

8. LEGACY PLANNING AND PHILANTHROPY

Estate and Wealth Transfer Strategies

Family Gifting Strategies

Philanthropic Giving

Trust Services

9. ADVANCED PLANNING

Next Gen Counseling and Planning

Educational Funding and Planning

Intergenerational Family Meetings

Business Succession Planning

10. COORDINATION WITH CPA AND ATTORNEY

Tax Control Strategies

Collaborative Meetings / Open Communication

Professional Introductions

Estate Documents and Tax Return Reviews

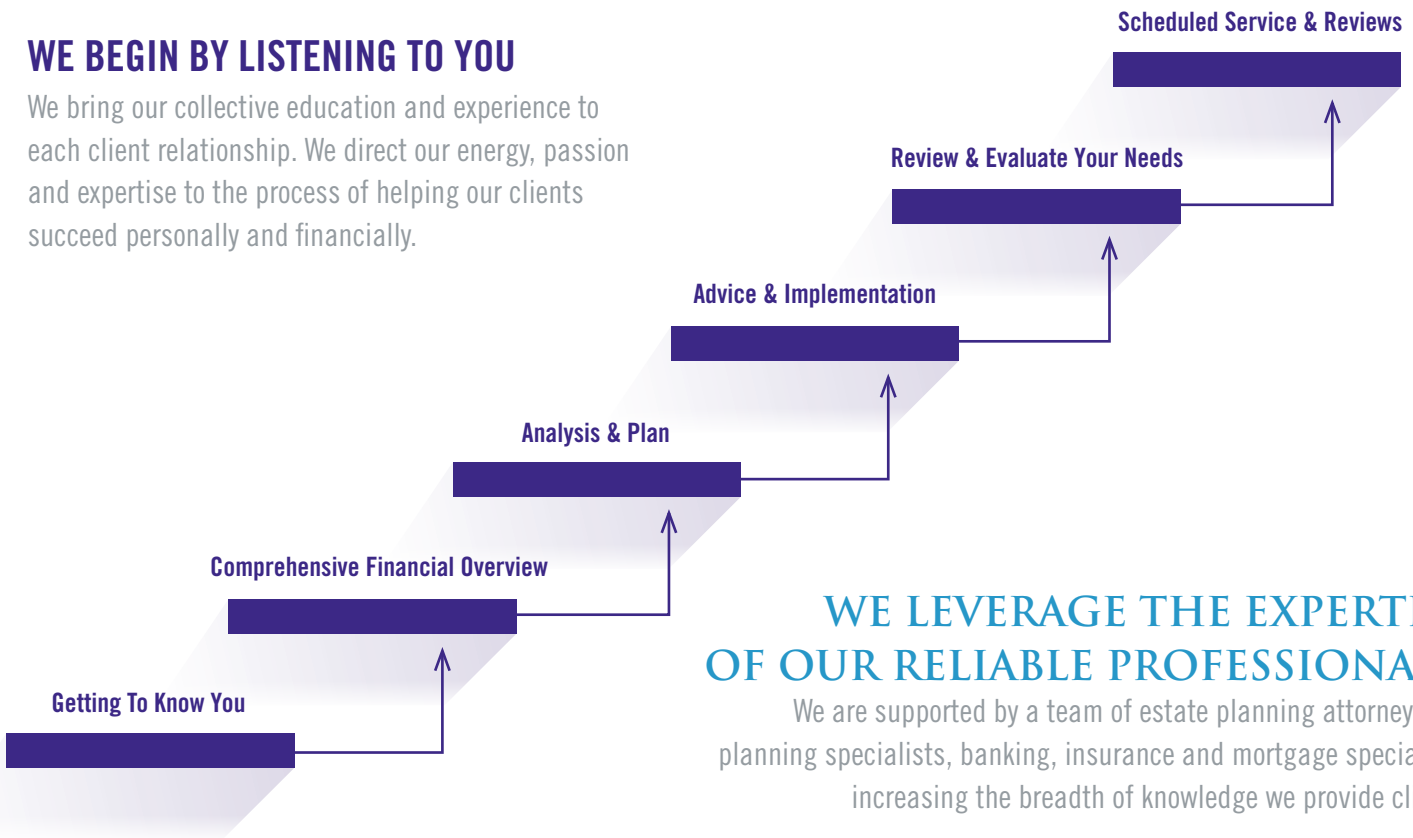
“I FOLLOW THREE RULES: DO THE RIGHT THING, DO THE BEST YOU CAN, AND ALWAYS SHOW PEOPLE YOU CARE.”

~LOU HOLTZ

OUR PROCESS

WE BEGIN BY LISTENING TO YOU

We bring our collective education and experience to each client relationship. We direct our energy, passion and expertise to the process of helping our clients succeed personally and financially.

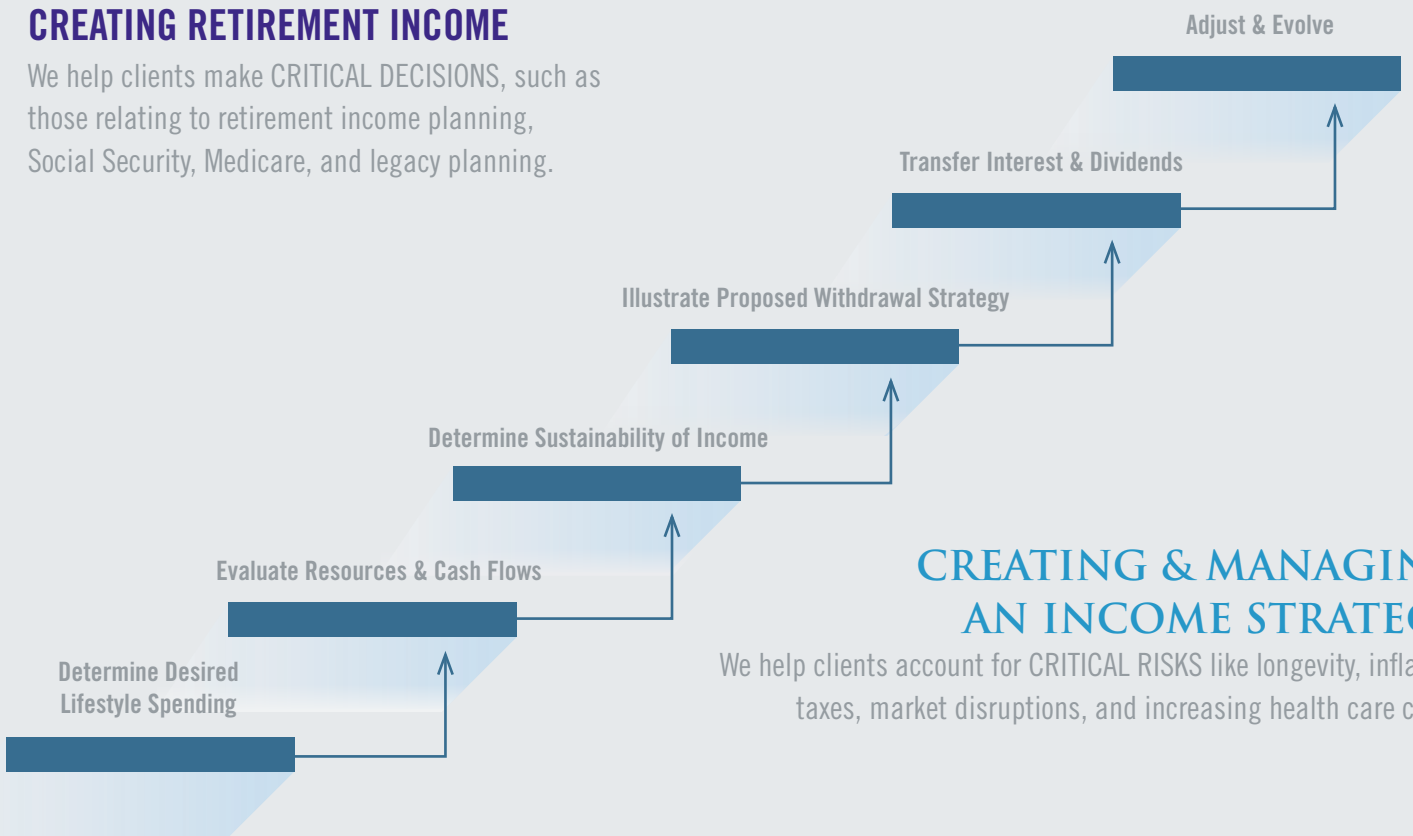


WE LEVERAGE THE EXPERTISE OF OUR RELIABLE PROFESSIONALS.

We are supported by a team of estate planning attorneys, tax planning specialists, banking, insurance and mortgage specialists, increasing the breadth of knowledge we provide clients.

CREATING RETIREMENT INCOME

We help clients make CRITICAL DECISIONS, such as those relating to retirement income planning, Social Security, Medicare, and legacy planning.



CREATING & MANAGING AN INCOME STRATEGY

We help clients account for CRITICAL RISKS like longevity, inflation, taxes, market disruptions, and increasing health care costs.

CUSTOMIZED PORTFOLIOS

STRIKE THE PROPER BALANCE

Diversification — spreading your assets among investment types, styles, and markets is one of the few time-tested strategies for investors with long-term financial goals.



BE PREPARED

When tempted by current market conditions, we counsel clients that it's best to avoid predictions and to focus on preparations. We're prepared for a bull or a bear market. Re-balancing will be our primary tool to take advantage of high or low prices that may arise.

WE BELIEVE...

- In putting clients first, all the time.
- Everyone has goals and needs a plan.
- Taxes, inflation, and human emotions stand as the real adversaries of wealth.
- Complexity should be avoided.
- We can help minimize debt and manage it prudently.
- Successful investing employs patience and discipline.
- In diversifying to help minimize losses in down markets. Good decisions arise from facts, numbers, experience, and values.
- Risks should be clearly understood and communicated.
- Costs should be fully disclosed and value delivered.
- The media amplify emotion and volatility in the markets.
- Disaster, bad news, and fear often create bargains.
- If it sounds too good to be true, it usually is.
- No matter what you read or watch, it's crucial to keep in mind its origin.

WHEN YOU BECOME A CLIENT, YOU BECOME PART OF OUR WORK FAMILY.



TONY PARR, CFP®

Partner

612-324-0231 | tony@pmwmg.com

As the founding partner of The Parr McKnight Wealth Management Group, Tony has had the privilege of being a trusted advisor to families and institutions for over 34 years. He has been instrumental in assembling the team, defining the long term vision, and

putting in place the structure and processes to effectively deliver exceptional service for clients. Tony brings energy, enthusiasm and creativity to the team and to our family of clients.

Tony wants to have a positive impact on the lives of other people and make his own little dent in the universe.



BRIAN MCKNIGHT, CFP®

Partner

612-324-0232 | brian@pmwmg.com

Brian joined the practice in 1998 and is a founding member of The Parr McKnight Wealth Management Group. He plays an instrumental part in the team's management of more than 55 public pension plans and is a portfolio manager for the team's strategies.

As a portfolio manager, Brian oversees, implements, monitors, and adjusts the strategies based upon decisions made by the investment committee. Brian formulates advanced estate planning strategies that help clients build, manage, preserve, and transition wealth.

Brian's mission is to help clients accomplish their goals in all facets of their lives.



JOHN RUDI, CFP®

Partner

612-324-0233 | john@pmwmg.com

As a partner of The Parr McKnight Wealth Management Group, John drives much of the planning and follow up involved in the client advisory process. Areas of focus include net worth management, asset preservation, estate strategies, education planning,

and liability management. He also helps retirees plan for consistent and predictable streams of income. In addition, John is constantly finding ways for the team to best utilize technology in an effort to make the planning process as clear and simple for clients as possible.

John strives to help clients realize that they have what it takes to be successful, financially secure, and live the life of their dreams.



PATTI KAVANAGH, FPQP®

Director of Relationship Management
Chief Administrative Officer

612-324-0235 | patti@pmwmg.com

Patti has 25+ years of experience in the financial services industry and provides an elevated standard of care to our clients and their families. Working with the team and with our clients' attorneys and/or CPAs,

she collaboratively plans long term strategies to help oversee financial assessments and family needs. She is committed to working ethically, creatively, and resourcefully to elevate our clients' life experience with us. She shares our client first philosophy, and with her emphasis on relationship management, is an asset to our team.

Patti is focused on deepening multi-generational relationships with our clients and continuously strives to be attentive to their financial needs.



KELLI HILL, JD, CFP®

Director of Wealth Strategies

612-324-0241 | kelli@pmwmg.com

Kelli brings over 25 years of experience in legal and financial services to her new role as Director of Wealth Strategies at Parr McKnight. Previously, she held leadership roles at Wells Fargo & Co. and Fiduciary Counselling, Inc., specializing in tax, trust, and estate planning

for ultra-high-net-worth clients. Kelli holds a Juris Doctor degree as well as her Certified Financial Planner (CFP®) designation and is an adjunct professor at the Carlson School of Management. Outside of work, she enjoys outdoor activities with her family and is an avid Packers fan.

Kelli's mission is to offer personalized financial planning and innovative solutions, ensuring families can grow, protect, and transfer their wealth with confidence, while making decisions that embody what is truly important to them.



NELSON MOEN, CFP®, ChFC®

Financial Advisor, Jr. Partner

612-324-0238 | nelson@pmwmg.com

Nelson joined the practice in 2016 and is a key member of the advisory team, helping clients tackle their personal and financial goals in a wide variety of areas. He assists clients in the areas of wealth management, retirement income planning, estate strategies, education

planning and asset preservation. He prides himself on his commitment to understanding the passions and priorities of his clients, relying on his attention to detail to weave those into a client's plan.

Nelson believes that a comprehensive wealth management plan is a key component to maximizing opportunity and happiness throughout our clients lives.

**MINDY PROW**

Senior Registered Relationship Advisor
612-324-0234 | mindy@pmwmg.com

Mindy serves our clients in her role as a Senior Registered Relationship Advisor. She brings with her more than 15 years of client-focused relationship management experience within the

financial services industry. Mindy has an extensive background with other financial institutions; this dynamic industry experience enables her to help clients with their needs while establishing comprehensive processes to enhance the client experience.

Mindy is dedicated to developing deep and authentic client relationships and she is committed to helping exceptional people live exceptional lives.

**ALLIE NORTHROP**

Client Relationship Manager
612-324-0237 | allie@pmwmg.com

Allie specializes in client service, as well as other operational and administrative tasks around the office. In addition, she is the point of contact for our Fire Department Relief Association clients,

whether it's processing retirement income distributions, coordinating client deposits and withdrawals, managing account transfers or providing account reporting or tax documentation, Allie works proactively to ensure clients have a tremendous service experience.

Allie's goal is to ensure that all clients receive exceptional service.

**MARISSA MOUNTAIN**

Administrative Client Associate
612-324-0240
marissa@pmwmg.com

Marissa welcomes our guests when they arrive at our office with a friendly face and warm hospitality. She also greets inbound callers and

helps direct them to where they can be best served. She leads the team's proactive approach to scheduling meetings with clients on a regular basis and ensures her teammates are well prepared to address what's most important to clients.

Marissa loves working with a team that truly loves what they do.

**JOE ENZLER, FPQP®**

Wealth Management Assistant
612-324-0242 | joe@pmwmg.com

Joe joined the team as a Financial Services Associate after being an intern for over a year starting in 2021. Graduating from the University of Minnesota with a Bachelor of Science degree in

Finance, Joe uses his knowledge to support the advisory team with operational aspects of client portfolios.

Joe is passionate about working hard to ensure our clients receive the care and service they deserve.

**EMILY DOLAN, FPQP®**

Senior Registered Relationship Manager
612-324-0239 | emily@pmwmg.com

With over 10 years of investment management experience, Emily provides excellent client service, organization and communication to our clients and families. She has extensive experience working

closely with ultra-high-net worth individuals, corporate executives and their families. Her in depth knowledge of investment products, restricted stock transactions and employee stock option transitions makes her an invaluable resource for clients.

Emily believes in delivering personalized and proactive service for her clients, while being a part of clients' lives in times that truly matter.

**KATIE MEEK**

Registered Client
Relationship Manager
612-324-0236 | katie@pmwmg.com

Katie specializes in client service and assists with day-to-day client needs. Her first priority is our clients' wellbeing and creating positive

experiences. She is driven by delivering excellent service and developing relationships through her operational and administrative tasks.

Katie's passion is putting clients first in her every day work and providing remarkable customer service in each client interaction.

**EMILY NOYES**

Wealth Management Assistant
612-324-0243
emily.noyes@pmwmg.com

Emily joined our team full-time in May 2022 after graduating from the University of St. Thomas. She brings fresh and new insights learned while

completing her coursework to earn a Bachelor of Arts degree in Financial Management. Emily works closely with the financial advisors on the team and she is involved with the operational aspects of clients' portfolios.

Emily is passionate about providing confidence to clients in their investment plan and lending a helping hand whenever it may be needed.

**MELISSA DEMIROVICH**

Marketing and Client
Engagement Coordinator
612-324-1236 | melissa@pmwmg.com

Melissa joined our team full time in May of 2023 after interning with the team during her time at Carlson School of Management. She brings a

creative and strategic approach to business administration and marketing tasks with the knowledge gained from her marketing major and strategic management minor. Working closely with many members on the team, Melissa is a multidimensional team player.

Melissa aims to bring a compassionate and diverse perspective to every encounter with clients and team members alike.

THE

PARR McKNIGHT

WEALTH MANAGEMENT GROUP

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Phone: 612-324-0240 | Fax: 612-208-1386

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EVENTS

Several times a year we host various unique client events designed to both enlighten and entertain.

NEWSLETTER

Our team newsletter features interesting articles on finance, health, life and politics.

SOCIAL MEDIA

We post to LinkedIn and Facebook regarding a wide array of themes that are not just finance related.

Topics include productivity, retirement, health and wellness, and many others.

VIDEO SHORTS

Bite size nuggets of wisdom to help you succeed with life and finances.

EDUCATIONAL WEBINARS

A few times a year we will talk with some of the best and brightest thought leaders in our business and discuss topics such as the markets, the economy, interest rates and more.

TONY'S TOP READS & PODCASTS

Tony Parr curates an interesting assortment of articles and links to videos designed to stimulate your mind and sharpen your perspective.