

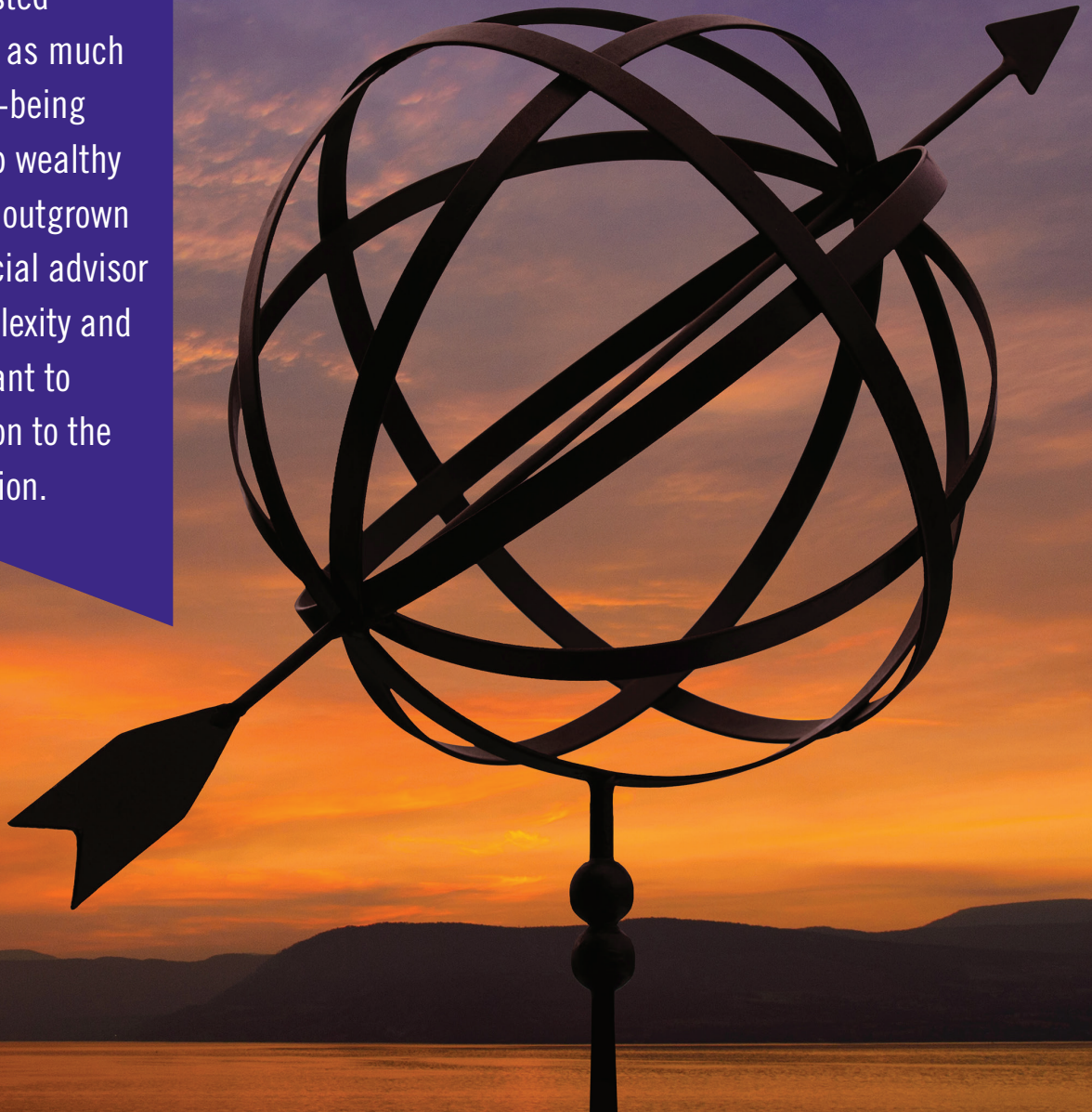
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THE  
**PARR McKNIGHT**  
WEALTH MANAGEMENT GROUP

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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.

# MEET THE TEAM



## CONGRATULATIONS TO OUR ENTIRE TEAM FOR BEING SELECTED AS ONE OF THE 2023 FORBES BEST-IN-STATE WEALTH MANAGEMENT TEAMS

and RECOGNIZED BY FORBES MAGAZINE as one of the Best-in-State Wealth Advisors\*: **Tony Parr**, Partner, in 2020, 2021, 2022 and 2023; **Brian McKnight**, Partner, in 2021, 2022 and 2023 and Top Next-Gen Wealth Advisor Best-in-State\*: **John Rudi**, Partner, in 2022 and 2023. We believe these honors have been achieved with the effort, talent, and stewardship of the entire team. The team provides a range of experiences and a specialized approach to multi-generational family planning. We are committed to helping clients plan effectively, invest wisely and map a realistic course for their future.



333 SOUTH 7TH SEVENTH STREET, SUITE 2370, MINNEAPOLIS, MN 55402 | 612-324-0232 | [WWW.PARRMCKNIGHTWVG.COM](http://WWW.PARRMCKNIGHTWVG.COM)

\*The Forbes Best-In-State Wealth Management Teams, Best-In-State Wealth Advisors, and Top Next-Gen Wealth Advisor Best-In-State rating algorithms are based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC, which does not receive compensation from the advisors or their firms in exchange for placement on a rating. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria. Fee paid for use of logo.

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN), Member SIPC. The Parr McKnight Wealth Management Group is a separate entity from WFAFN. CAR 0323-02104

# 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

Life and Disability Insurance

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.

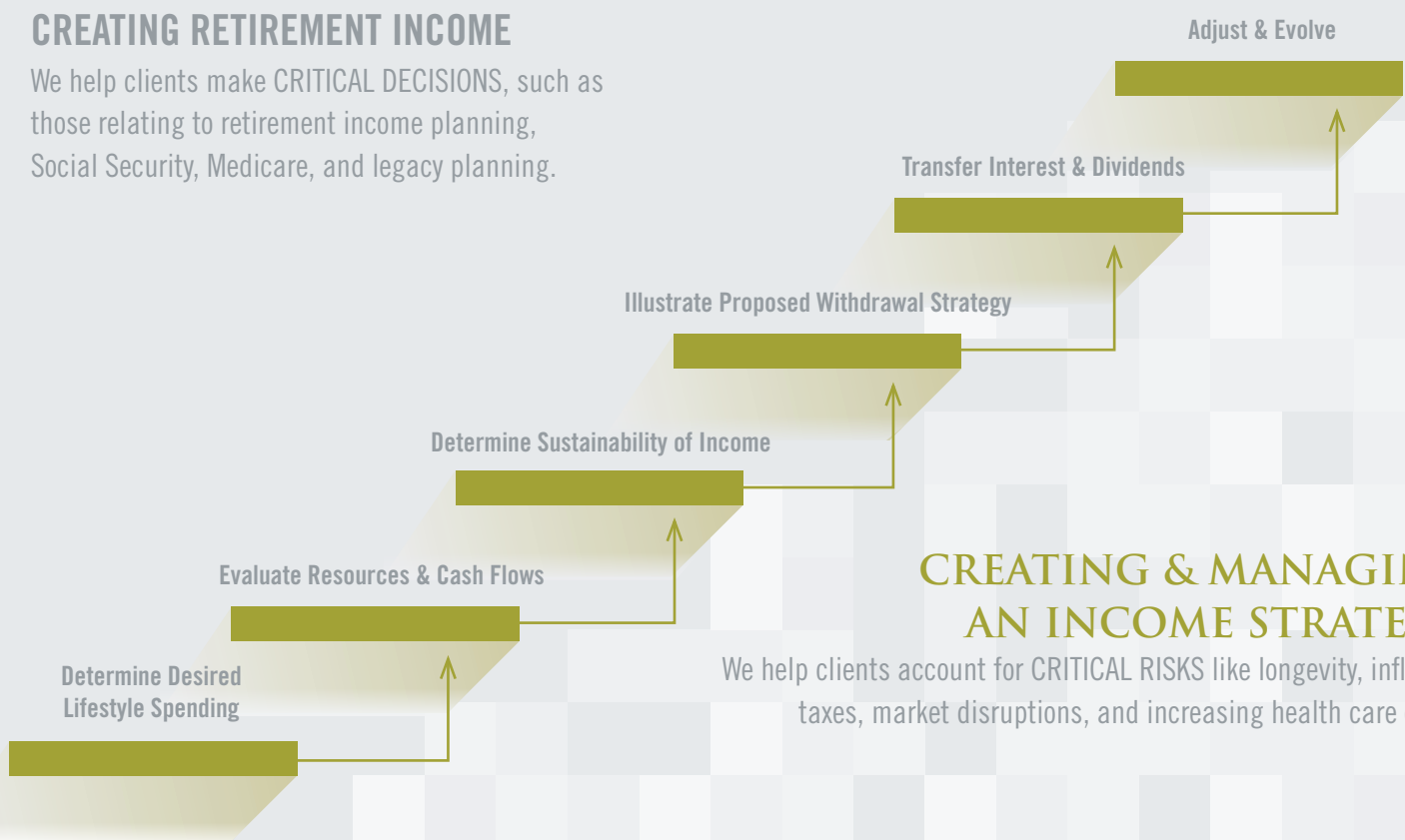


## WE HARNESS THE VAST RESOURCES OF WELLS FARGO & CO.

We bring the services, resources, and strength of Wells Fargo & Co. We are supported by an outstanding team of estate planning attorneys, tax planning specialists, and insurance specialists, increasing the breadth of expertise 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.
- The true enemies of wealth are taxes, inflation, and human emotion.
- 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.
- It's important to remember where it came from.

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



**TONY PARR, CFP®**

Partner

612-324-0231 | [tony@pmwmg.com](mailto: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](mailto: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](mailto: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](mailto: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.*



**NELSON MOEN, CFP®, ChFC®**

Financial Advisor

612-324-0238 | [nelson@pmwmg.com](mailto: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.*

“I CAN DO THINGS  
YOU CANNOT, YOU  
CAN DO THINGS I  
CANNOT; TOGETHER  
WE CAN DO  
GREAT THINGS.”

~MOTHER TERESA



**MINDY PROW**

Senior Registered Relationship Advisor  
612-324-0234 | [mindy@pmwmg.com](mailto: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](mailto: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](mailto: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**

Wealth Management Assistant  
612-324-0240 | [joe@pmwmg.com](mailto: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](mailto: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](mailto: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](mailto: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  
612-324-0240 | [melissa@pmwmg.com](mailto: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.*

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THE

# PARR McKNIGHT

WEALTH MANAGEMENT GROUP

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**CLARITY. CONFIDENCE. STRUCTURE.**

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

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The PIM program is not appropriate for all investors. Please carefully review the Wells Fargo Advisors advisory disclosure document for a full description of our services. The minimum account size for this program is \$50,000.

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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

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