

## **Emerald Connect | video-bio-nelson-moen**

---

I'm Nelson Moen. I'm the newest financial advisor on the team. I grew up in Plymouth, went to Wayzata High School. Ended up going to college at the University of Minnesota, as well.

I knew I'd always love dealing with numbers. I love problem solving. But also, I know that I have a very outgoing personality. And so, kind of thought that this finance career might work for me. You get to mix both of them together, where you get to sit down and have those deep conversations. But then, on the back end, you're working with the numbers side of things.

My role is a unique one. We are, this is a small family crew that we have here. There's a lot of stuff that needs to be done in our business. So that requires you to wear a lot of different hats. And I think it's actually something I love doing because no day is the same. One day I'll be working on our technology. The next day, I'll have three client meetings, where I'm sitting in directly with the partners.

Really, what's the most rewarding in general, is the ability that you have to provide happiness to clients. It can be something as small as educating a client on what's the difference between a stock and a bond. Or, it can be something that's more in depth, where a client comes in and they have no idea what's going on in their entire financial life.

When you're able to go through all of their outside accounts, look at how their plan's tracking with the market. And you kind of wrap it all together for them. You see that sense of happiness and almost relaxation that comes with leaving a meeting, knowing you're going to be OK. There's something unique about this career where you really get personal. You to get deep with clients and build that bond.