HELPING CLIENTS ACHIEVE FINANCIAL **CLARITY**, **CONFIDENCE**, AND **STRUCTURE**.

A wealth management practice focused on delivering independent, objective, and unbiased guidance for building wealth and achieving life goals.

(l to r) ***Allie Northrop****, Client Relationship Associate;* ***Nelson Moen****, Financial Advisor;* ***Barb Folz****, Senior Registered Relationship Manager;* ***John Rudi****, CFP®, Partner;* ***Tony Parr****, CFP®, Partner;* ***Brian McKnight****, CFP®, Partner;* ***Patti Kavanagh****, Senior Registered Relationship Manager*

At **Parr McKnight Wealth Management**, three keywords lead clients to financial stability and beyond.

CLARITY is helping clients get their arms around all their financial affairs. It is also the capacity to see their situations in fresh and revealing ways and identify issues often overlooked.

CONFIDENCE is clients knowing there's a plan in place and that they are on track in pursuit of life's goals.

STRUCTURE is clients having their financial affairs thoughtfully and thoroughly organized, guided by a highly trained and qualified team of professionals.

THE PARR MCKNIGHT WEALTH MANAGEMENT GROUP

CLARITY. CONFIDENCE. STRUCTURE.

When CERTIFIED FINANCIAL PLANNERS™ Tony Parr, Brian McKnight, and John Rudi talk about Parr McKnight Wealth Management Group—the renowned Minneapolis financial advisory practice where they've been partners for many years—it's clear the three aren't just partners. Rather, they're friends with a deep respect for each other. At ages 52, 42, and 32, respectively, they offer clients a generational perspective and the collective wisdom gathered from decades of serving families, institutions, and nonprofit organizations.

Today, Parr McKnight Wealth Management Group oversees approximately half a billion dollars in assets* for selected families and provides advice and service to more than 60 nonprofit institutions. The three partners seem to finish each other's sentences, and it's obvious they're on the same page.

"We love nothing more than helping people achieve a lifetime of financial security by helping them build, manage, protect, and transition their wealth," Parr says.

"Clients just feel more confident when they have a detailed plan in place and a trusted advisory team to guide them," Rudi adds.

"Many of our clients have gone from achieving financial success to becoming *financially significant.* They've developed a philanthropic spirit and robust relationships. We are privileged to be a part of their journey," McKnight continues.

THE CONVERSATION, THE DETAILS, THE PLAN

Parr McKnight's advisory process begins with listening so that the team learns what's most important to clients. "We believe that goals, values, and beliefs, as well as family structure and dynamics, play important roles in planning. They are every bit as important as balance sheets, cash flows, tax-efficient investment strategies, and investments," states Rudi.

From information gleaned during those critical first meetings, Parr McKnight advisors craft a customized, elegant, and detailed plan using the most cutting-edge financial tools available. "The overall plan addresses estate issues, portfolio income planning, long-term care, and philanthropy," McKnight elaborates.

The plans Parr McKnight creates are calibrated to ensure clients can stay on track through a variety of scenarios. With more than 30 years of service to clients, Parr has come to believe that "the greatest risk to a client's well-being is deviating from a long-term plan in search of short-term comfort during times of temporary unease. Our planning process and the education we provide help replace the stress often felt during times of uncertainty with confidence."

Parr McKnight Wealth Management works with CPA firms, estate planning attorneys, and Wells Fargo affiliates to provide best-in-class services and resources—delivered effectively and efficiently through a small, family-oriented, and entrepreneurial firm.

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