



Jason Soland, CFP®
CERTIFIED FINANCIAL PLANNER™ Professional
Trust Officer, VP
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About Jason

As a dedicated and experienced financial planner since 2007, Jason will work as a trust advisor with you to create and accommodate the simplest of strategies to the most complex. Jason offers best practices and solutions that will guide you with clear focus on your objectives.

Experience & Education

- CERTIFIED FINANCIAL PLANNER™ Professional – 2015
- LUTCF – Life Underwriting Training Council Fellow – 2013
- APMA® – Accredited Portfolio Management AdvisorSM – 2017
- Cannon School for Trusts & Estates
- Luther College, BA in Accounting – 2000

Professional Associations

- National Association of Insurance & Financial Advisors
Board member, 2008 – 2018
President, 2010 – 2018
- Financial Planning Association, 2015 – Present
- Iowa Trust Association

Community & Family

- Nordic Fest
Board of Directors, 2010 – 2014
Sports Committee, 2010 – Present
- Chamber Golf Outing Committee, 2010 – Present
- Decorah Area Chamber of Commerce
- Rotary Club
- Married to Jennifer Soland, two daughters, Quinn & Charlie

Helping people accumulate,
preserve, and transfer wealth.

Our Commitment to You

Our clients' interest come first.
By serving you well, we will also succeed.

Trusts can provide a wide range of benefits, including:

- ◆ Protecting your privacy and allowing you the level of involvement and control you want.
- ◆ Relieving you of as many or as few of the day-to-day tasks of managing your wealth as you choose.
- ◆ Minimizing estate and gift taxes.
- ◆ Ensuring your assets are professionally managed should you become incapacitated.
- ◆ Helping avoid delay and publicity of probate when your estate passes to heirs.
- ◆ Serving as an outside third party to reduce anxiety and friction that too often results from placing trustee responsibilities on family members.

Decorah Bank

& TRUST CO.

202 East Water Street ◆ Decorah, Iowa 52101

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