EPI TWIN CITIES METRO AREA | 2026

MEMBER DIRECTORY

Meet Our Community of Advisors and Chapter Leaders

Exit Planning Institute®

Twin Cities Metro Area Chapter

Exit Planning Institute
Twin Cities Metro Area Chapter

Letter From Our President

TODD KROUGH, CEPA®

Dear CEPA Colleagues and Fellow Exit Planning Professionals,

Welcome to the Twin Cities EPI Chapter Member Directory. This directory is more than just a listing of names and contact information—it's a reflection of the dynamic, committed, and collaborative community we've built together. As our chapter continues to grow, this tool becomes increasingly valuable for fostering meaningful connections, deepening professional relationships, and creating new opportunities for collaboration. Whether you're seeking to refer a trusted advisor, build your team of value creation professionals, or simply get to know your fellow members better, I encourage you to use this directory as a bridge. Behind every name is a story, a specialty, and a desire to support business owners in building, growing, and eventually exiting with success and purpose. The Twin Cities Exit Planning Institute chapter is here to help you make the most of your CEPA® designation and empower you to serve your clients as their most valuable advisor as you help your clients move from success to significance. Reach out to me or any of our board member leaders if you need support to help you succeed in maximizing your CEPA® design

Todd Krough, CEPA®
Private Wealth Advisor,
UMB Private Wealth Management

BOARD MEMBERS

Exit Planning Institute
Twin Cities Metro Area Chapter

President

Todd Krough, CEPA®

Wealth Advisor, UMB Private Wealth Management
todd.krough@umb.com | LinkedIn

My maternal grandfather taught me the value of saving and investing. Though he retired as a high school principal, his investing success allowed him to donate seven figures to Gustavus Adolphus College, my alma mater. Those lessons shaped my financial foundation.

After working with some of the world's largest financial firms, I now help clients at Community Bank powered by HTLF Bank by delivering personalized guidance with a client-first approach. I now help clients at UMB Bank by delivering personalized guidance with a client-first approach.

EXECUTIVE DIRECTOR

Jessica Hawthorne

President & Owner, Office Connection®
admin@e-officeconnection.com | LinkedIn

Jessica Hawthorne is the President of Office Connection®, a woman-owned business specializing in association management and administrative support for clients across the United States.

"What drives me to support chapters?" It's always the passion of the chapter's volunteers. I'm excited to lead alongside the advisory board, learn from industry thought leaders, and help members to make personal & professional connections!"

FOUNDING PRESIDENT

Julie Keyes, CEPA®

Exit Advisor, Podcaster, Consultant & Instructor, KeyeStrategies, LLC
Julie@KeyeStrategies.com | LinkedIn

KeyeStrategies is an advisory firm for entrepreneurs looking to grow and improve their business, while also providing Exit Planning and Transition services for companies between $5-30M in annual revenue. The firm's mission is to help business owners increase enterprise value and prepare the owner and the business for a future exit. Our tagline says it all… "Build enterprise value today, so you can exit on your own terms tomorrow".

VICE PRESIDENT & SECRETARY

Dyanne Ross-Hanson, CEPA®, ChFC, CLU, CFP

Founding Principal, Exit Planning Strategies, LLC
drh@exitplanstrategies.com | LinkedIn

President & Founder of Exit Planning Strategies, LLC. A firm dedicated to helping business owners navigate and take control of the most significant financial transaction of their lives, exiting their business. She works with owners and their Advisory Team who are 3-10 years from divestiture in capital and/or contribution. Helping to educate, evaluate, and formulate an intentional plan for ownership transition. Complete with an Action Checklist. And outcome agnostic. So that owners can depart on their terms, to their party of choice, and for the dollars they deserve.

BOARD MEMBERS

Exit Planning Institute®
Twin Cities Metro Area Chapter

DIRECTOR

Stuart Krahn, CEPA®, CM&AA®

President & Founder, KrahnCapital Group, LLC
stuart@krahncapitalgroup.com | LinkedIn

Stuart Krahn is the founder and President of Krahn Capital Group, LLC, with experience leading buy-side and sell-side investment banking engagements across multiple industries. He holds degrees from Saint John's University, Loyola University Chicago, and the University of Minnesota, including an MBA in Finance and Strategic Management. He is also a Minnesota-licensed real estate broker and FINRA-registered representative.

DIRECTOR

Eric Mitchellette, CEPA®

President & Founder, Strategic Business Coach, Inc
emitchellette@sbciusa.com | LinkedIn

Serving as a financial and technology executive, board member and consultant with broad experience improving the financial operations of distributors, manufacturers, and service operations for both small to multinational companies. Skilled in turning around underperforming and distressed financial operations by implementing critical changes to increase profitability, increase revenue, increase cash flow and improve receivables management.

DIRECTOR

Robert Morse

VP Senior Community Business Banking, MidCountry Bank
Robert.Morse@Midcountrybank.com | LinkedIn

Focusing on what matters most. Long-time clients tell me that I'm not your "typical" Banker. I treat each client as my most important client, not just another number, and actively search for different options to get things done. I take personal ownership of my clients' experience, providing common-sense consultation approaches to help them grow their businesses and themselves.

DIRECTOR

Rob Stark, ChFC®, CEPA®

Financial Advisor, Edward Jones
rob.stark@edwardjones.com| LinkedIn

Rob Stark thrives on helping business owners navigate the complex journey of transitioning out of their companies. His mission is to serve as a trusted partner, supporting them from the beginning through their greatest achievement.

CHAPTER MEMBERS

Exit Planning Institute®
Twin Cities Metro Area Chapter

Use the information below to connect and collaborate with local industry experts in the Minneapolis area.

Meet our Members

Amy Aadalen, CFP®, CEPA®

Senior Vice President & Financial Advisor, Morgan Stanley

amy.aadalen@morganstanley.com
LinkedIn

Ryan Ash, CFP®, CAP®, FIC, RICP®, CEPA®

Wealth Coach & CEO, Entirety Wealth Solutions

ryanash@entiretywealth.com
LinkedIn

Robert Bayer CEPA®, ChFC, CLU, RICP, BFA

President and Registered Principal, Stonebrooke Wealth Management

robert.bayer@lpl.com
LinkedIn

Sonja Bjork, CEPA®

Financial Advisor, CSV Financial Advisors LLC

sonjab@csvfinancial.com
LinkedIn

Sam Boddicker, CEPA®

Financial Advisor, Edward Jones

sam.boddicker@edwardjones.com
LinkedIn

Ali Carbo

Partner, Copeland Buhl

ali_carbo@copelandbuhl.com
LinkedIn

CHAPTER MEMBERS

Exit Planning Institute®
Twin Cities Metro Area Chapter

Use the information below to connect and collaborate with local industry experts in the Minneapolis area.

Meet our Members

Douglas Cook, CEPA®

**Senior Value Advisor,
Headwaters Strategic Succession Consulting, LLC**

doug.cook@headwatersstrategic.com
LinkedIn

Matthew Delaney, CFP®, CEPA®

**Senior Wealth Manager,
Boulay**

mdelaney@boulaygroup.com
LinkedIn

John Eckhardt

**President,
Code Pros, LLC.**

john@codepros.biz
LinkedIn

Robin Edgar

**Wealth Strategist,
Wealth Progression Group**

robin.edgar@wealthprogressiongroup.com
LinkedIn

Jamison Edlund, CFP®

**Financial Advisor,
CorTrust Wealth Management/
Raymond James Financial Services**

jamison.edlund@raymondjames.com
LinkedIn

Claire Fredrickson

**Director of Marketing & Client Relations,
Intellex Forensics**

claire.fredrickson@intellexforensics.com
LinkedIn

CHAPTER MEMBERS

Use the information below to connect and collaborate with local industry experts in the Minneapolis area.

Meet our Members

Thomas Gillund, CEPA®, QPFC

Vice President & Financial Advisor,
Morgan Stanley

thomas.gillund@morganstanley.com
LinkedIn

Jim Gruber, CEPA®, PRC

President & Founder,
Novare Business Advisors

jgruber@novarebusinessadvisors.com
LinkedIn

Ryan Haag CFP®, CEPA®, AEP, CLU, ChFC

Advisor,
Tradition Wealth Management

Ryan.haag@traditionwealth.com
LinkedIn

Steve Haarstad, CEPA®

Business Growth Consultant,
Enterprise Minnesota

shaarstad@enterpriseminnesota.org
LinkedIn

MIke Huey, CEPA®

President,
Scalable Sales Solutions

mike@scalablesalessolutions.com
LinkedIn

Patrick Jensen, CFP®

Financial Advisor,
Edward Jones

patrick.jensen@edwardjones.com
LinkedIn

CHAPTER MEMBERS

Exit Planning Institute®
Twin Cities Metro Area Chapter

Use the information below to connect and collaborate with local industry experts in the Minneapolis area.

Meet our Members

Andy Kocemba

President and CEO,
Calhoun Companies

andy@calhouncompanies.com
LinkedIn

Stuart Krahn, CEPA®, CM&AA®

President
Krahn Capital Group

stuart@krahncapitalgroup.com
LinkedIn

Nathan Krampe, CFP®, CPA, CPWA®,

Wealth Advisor & Founder,
Lion's Wealth Management

nate@lionswealth.com
LinkedIn

Pravin Kumar, CEPA® , CFA, CFP®

Financial Advisor
Morgan Stanley

pravin.kumar@morganstanley.com
LinkedIn

Dave Latzke

Managing Partner,
Cherry Tree & Associates

dlatzke@cherrytree.com
LinkedIn

Tammy Laurent, CPWA®, CEPA®, CRPC™, AAMS™

Financial Advisor and Certified
Private Wealth Advisor,
Edward Jones

Tammy.laurent@edwardjones.com
LinkedIn

CHAPTER MEMBERS

Exit Planning Institute®
Twin Cities Metro Area Chapter

Use the information below to connect and collaborate with local industry experts in the Minneapolis area.

Meet our Members

Christopher McBride

President,
Exit Factor of Minnetonka

chris.mcbride@exitfactor.com
LinkedIn

Dana J. Menard, CFP®, RLP®, CEPA®, CBDA℠, CDAA™

Financial Planner & Founder,
Twin Cities Wealth Strategies

dana@tcwealthstrategies.com
LinkedIn

Erin Mickels, CPA

Principal
CLA (CliftonLarsonAllen)

erin.mickels@claconnect.com
LinkedIn

John Joseph "Joe" Miller, Jr., CEPA®

First Vice President, Wealth Management, Financial Advisor
UBS

j.j.miller@ubs.com
LinkedIn

Bill Mulvahill, CPA CFP® CEPA® MBT

Wealth Advisor & Partner,
Trailhead Planners

bill@trailheadplanners.com
LinkedIn

Blake R. Nelson

Attorney at Law,
Hellmuth & Johnson

bnelson@hjlawfirm.com
LinkedIn

CHAPTER MEMBERS

Exit Planning Institute®
Twin Cities Metro Area Chapter

Use the information below to connect and collaborate with local industry experts in the Minneapolis area.

Meet our Members

Heidi Olson, CEPA®

Financial Advisor,
Edward Jones

heidi.m.olson@edwardjones.com
LinkedIn

Jeff Olson, CEPA®, CRPC™, FA

Financial Advisor,
Edward Jones

jeff.olson@edwardjones.com
LinkedIn

Gary Orcutt

Owner & Licensed Real Estate Salesperson Broker,
Orcutt Capital

gary.orcutt@star.bank
LinkedIn

Kelly S. Olson Pedersen, CFP®, CEPA®, CDFA

Certified Financial Planner, Founder, and CEO
Caissa Wealth Strategies

kelly@caissawealth.com
LinkedIn

Ben Pohlman

Director of Business Development
All in One Accounting

ben.pohlman@allinoneaccounting.com
LinkedIn

Bradndon Prell, CFP®, ChFC®, CPWA®

Financial Advisor,
Edward Jones

brandon.prell@edwardjones.com
LinkedIn

CHAPTER MEMBERS

Exit Planning Institute®
Twin Cities Metro Area Chapter

Use the information below to connect and collaborate with local industry experts in the Minneapolis area.

Meet our Members

Jen Root, CPRM, CPRIA, CISR

VP, Senior Business Development Executive,
Marsh Private Client Services

jen.root@marshmma.com
LinkedIn

Theresa Ryan CFP®, CEPA®

Financial Advisor,
Edward Jones

theresa.ryan@edwardjones.com
LinkedIn

Andrew Schwandt

M&A Advisor,
True North M&A

aschwandt@sunbeltmidwest.com
LinkedIn

Lee A. Schwartz

Owner,
Advanced Planning Solutions

lee@leeanthonyschwartz.com
LinkedIn

Erik Stapleton, MBA, CFA

Vice President, M&A Advisory,
True North M&A

erik.stapleton@gmail.com
LinkedIn

Barb Steinhauser, CPA, CGMA, CEPA®

Founder,
Guiding Light Strategic Business Advisors

barb@barbsteinhauser.com
LinkedIn

CHAPTER MEMBERS

Exit Planning Institute®
Twin Cities Metro Area Chapter

Use the information below to connect and collaborate with local industry experts in the Minneapolis area.

Meet our Members

Eric Stephens, CPA, CFE, TEP

Founder & Managing Director,
Intellex Forensics Advisory Services

eric.stephens@intellexforensics.com
LinkedIn

Kevin Sullivan, ASA, CPA/ABV

CEO,
Sullivan, Ltd.

kevinsullivancpa@sullivan-ltd.com
LinkedIn

Julie Thiel

Founder & CEO,
Thiel Talent Strategy

julie@thieltalentstrategy.com
LinkedIn

Jennifer Tix, CEPA®

Financial Advisor,
Thrivent

jennifer.tix@thrivent.com
LinkedIn

Geoff Turgeon

President,
Marquette Wealth Management

chris.vernier@marquettewm.com
LinkedIn

Chris Vernier

President,
Marquette Wealth Management

chris.vernier@marquettewm.com
LinkedIn

CHAPTER MEMBERS

Use the information below to connect and collaborate with local industry experts in the Minneapolis area.

Meet our Members

Jon Yocum, CRPC™, CEPA®

Assistant Vice President, Relationship Manager, Portfolio Advisor,
Merrill Lynch Wealth Management
jonathan.yocum@ml.com
LinkedIn

SPONSORS

Calhoun Companies

A Trusted Advisor for Your Clients
We regularly work with exit planners who have clients that are looking to buy or sell a business. We know that buying or selling a business is one of the most impactful events of your client's life, and it's important to know who to turn to for advice. We've been in the business of matching buyers and sellers for more than 115 years and know what it takes to create win-win deals for everyone involved.
Is your client thinking about selling, but not ready to pull the trigger yet? It's the perfect time to connect. We often help buyers and sellers well before the time of sale define their priorities, understand the factors involved in a business sale, and lay the groundwork for success.

Code Pros

CUSTOM SOFTWARE DEVELOPMENT

Revolutionize Your Operations Without Starting Over

No need for expensive software swaps or hiring an in-house developer - get the most out of what you already have. Code Pros extends the life and enhances your existing software.

Edward Jones

Our investment philosophy

We've spent the last century helping investors achieve what's most important to them using a straightforward investing philosophy: Maintain a long-term perspective, focus on quality, and manage risk through diversification.

SPONSORS

Headwaters Strategic Succession Consulting

Business Succession Planning & Business Transition Management

A succession strategy isn't about simply exiting your business in the future. It's about aligning actions to keep value streams growing and alive today, which best support the long-term needs of owners, their families, and their employees. This is the key to maximizing your business valuation.

HEADWATERS
STRATEGIC SUCCESSION CONSULTING, LLC

Hellmuth & Johnson

30 Years by your side

As a trusted legal partner, we are proud to have been at our clients' sides for over 30 years. Our Minneapolis attorneys focus on transactional law, litigation, and appeals, and represent clients in a wide range of practice areas, ranging from business, construction, family law, finance, litigation, and real estate to trusts & estates.
We have earned a reputation for multidisciplinary excellence, unwavering ethical integrity, and singular devotion to those who put their trust in us. Our mission is to protect and advance our clients' interests across the spectrum of their legal needs, and we are proud to always be by their sides.

HELLMUTH & JOHNSON

Krahn Capital Group

Krahn Capital Group, LLC provides merger and acquisition broker services and capital raising solutions to small and medium-sized businesses and the people who own and invest in them. We have expertise across a wide range of industries.

KRAHN CAPITAL GROUP
krahncapitalgroup.com

SPONSORS

Exit Planning Institute®
Twin Cities Metro Area Chapter

Scalable Sales Solutions

At Scalable Sales Solutions, our consulting process is systemized so that every client receives the same high-quality experience—tailored to your unique needs and company culture. We start with a comprehensive assessment that helps you “take off your sales hat” and see the bigger picture. From there, we guide you through a transformative 6-month program that sets the stage for either robust scaling or a strategic sale.

Stonebrooke Wealth Management

Each of us at Stonebrooke Wealth Management are highly educated in our field. We recognize that you are valuable, have been blessed with unique gifts, talents and a purpose for life. Backed by the power and strength of LPL Financial, their Trust service affiliates, technology and integrated investment platforms, we are committed to taking you to another level in the investment planning environment. Our experience tells us that the majority of people today view investing / investment planning from the left-brain logical point of view. This isn’t good or bad- it’s just not complete. 96% of human decisions come from the right (creative) side of your brain. With Stonebrooke, we listen twice as much as we speak, align your values and goals, then monetize them with the data as support. This style of planning is powerful and will have a positive effect on the way you live life going forward.

EPI TWIN CITIES METRO AREA | 2026

Exit-Planning-Institute.org

EPI

Exit Planning Institute®

Twin Cities Metro Area Chapter