



EPI TWIN CITIES METRO AREA | 2026

# MEMBER DIRECTORY

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Meet Our Community of Advisors  
and Chapter Leaders



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



## President

### Todd Krough, CEPA®

Wealth Advisor, UMB Private Wealth Management  
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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®  
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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  
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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

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Founding Principal of Exit Planning Strategies, LLC, she has spent more than 20 years helping business owners develop comprehensive exit plans that protect their legacy and maximize business value.

Outside of work, she enjoys visiting National Parks, skiing in Colorado, and spending summers in Minnesota with her family.



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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.



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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

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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®

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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.

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

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# 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.



## 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.



## 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.



# SPONSORS

## 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.



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