



Northland Private Client Group

Northland Private Client Group does business under Northland Asset Management. Northland Asset Management is a Registered Investment Advisor offering wealth and investment management services to institutions and individuals.

Northland Asset Management is registered with the Securities & Exchange Commission.

ADV I and ADV II information may be obtained at this SEC website link: www.adviserinfo.sec.gov/IAPD/Content/Search/iapd



KARL SCHMIDTKE, CFA Wealth Advisor

Karl Schmidtke is a Senior Vice President with Northland Securities and is a Portfolio Manager for Northland Asset Management. He is a Chartered Financial Analyst and has twelve years of portfolio management experience, with a broad knowledge of both debt and equity securities, and a particular expertise in exchange traded funds (ETF's). Mr. Schmidtke has extensive experience with assisting retired clients to develop portfolios that produce income, limit risk, and provide opportunities for growth. He obtained a degree in Finance and Economics, as well as his MBA, from Baylor University.



JEFF LEHRER, CFP® Wealth Advisor

Jeff Lehrer is a Vice President with Northland Securities and specializes in providing wealth management services and strategies to high net worth individuals, families and small businesses. He is a Certified Financial Planner and has over twelve years of experience advising clients on retirement planning, estate planning and investment management. Mr. Lehrer has extensive experience with goal planning, risk analysis, cash flow analysis and survivorship guidance. Mr. Lehrer earned a Bachelor of Business Administration degree in Finance from the University of Wisconsin-Whitewater and the Certified Financial Planner designation from the College of Financial Planning in Denver Colorado.



KATIE MASON Client Service Specialist

Katie Mason is a Sales Assistant with Northland Securities. She has been with the company since 2008. Ms. Mason works primarily with operations and new account openings. She has a degree in Journalism and Public Relations from the University of Wisconsin-Whitewater.



JOHN SCHUMACHER Portfolio Strategist

John Schumacher is a Senior Vice President in Bond Trading at Northland Securities. He is a Portfolio Manager for Northland Asset Management, and is responsible for client fixed income strategies. Mr. Schumacher has twenty-two years of experience in bond trading, including municipals, corporate bonds, and mortgage backed securities. In addition, he has expertise in evaluating and trading distressed debt securities, and has been the Managing Partner for two fixed income hedge funds, known as Bondhawk I and Bondhawk II. He graduated with honors in Finance from the College of St. Thomas.



JODIE HALL Performance Analyst

Jodie Hall is a Vice President with Northland Securities and is the Performance Analysis for Northland Asset Management. Ms. Hall has been in the securities industry since 1996, working primarily in the areas of operations and compliance. Ms. Hall monitors account performance in regard to established benchmarks and account objectives, and produces quarterly reports for client and advisor review. She has a degree in Social Studies and Education from Moorhead State University.

ABOUT NORTHLAND SECURITIES, INC.

- Over 6000 clients in the Midwest
- Over \$6 billion in client assets
- A leading bond underwriter in the Midwest (*Source: Thomson Reuters*)
- 155 Employees, 39 shareholder employees
- Significant ownership by Glen Taylor, a Minnesota business leader
- Northland Securities, Inc. does RIA business as Northland Asset Management
- Member Finra/SIPC



2675 N. Mayfair Rd, Suite 550, Milwaukee, WI 53226

414-727-2229 or 866-333-0141

www.northlandsecurities.com

ASL#1053

SERVICES:

PROFESSIONAL PORTFOLIO MANAGEMENT

- Access to U.S. and international institutional portfolio managers.
- Cost-efficient portfolio design using exchange traded funds, mutual funds, closed end funds and separately managed accounts.
- Fixed Income – Access to individual bonds and new bond issues.
- Real Estate Investment Trusts – Access to national market opportunities.
- Continual monitoring of asset allocation, diversification and performance of overall portfolio.
- Continual monitoring and due diligence of individual investment vehicles and portfolio managers.

INDIVIDUAL AND FAMILY WEALTH MANAGEMENT

- Initial financial plan design with ongoing monitoring – including distribution planning and cash flow analysis.
- Life insurance review and consultation
- Estate planning review
- Business succession planning
- Roth IRA conversions
- Employer retirement plan review and consultation
- Social Security benefits consultation
- Required minimum distribution consultation
- Survivorship Guidance