

**Bill O'Connor**

Vice President
Wealth Management

CONTACT

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BACKGROUND

Bill O'Connor, Vice President, has over 30 years of industry experience and has been with Northland Securities since 2003. He works closely with individual, institutional, and family office clients to develop and build portfolios designed for both suitability and performance. Bill focuses on providing tax-efficient strategies and solutions for clients seeking to meet their income, growth, and wealth-transfer goals.

Outside of work, Bill is active in several local nonprofit organizations. He enjoys spending time with family and friends and being outdoors with his dog, Piper.

EDUCATION

Bill graduated from Bradford College in Bradford, MA, with a BA degree in Finance and Management.

PROFESSIONAL LICENSES/REGISTRATIONS

Bill is an Investment Adviser Representative with Northland Asset Management, and maintains the FINRA Series 7 General Securities Representative, Series 63 Uniform Securities Agent Exam (Minnesota), and Series 65 Uniform Investment Adviser registrations, as well as his MN Life/Health insurance license.

NORTHLAND WEALTH MANAGEMENT

Northland Wealth Management is a division of Northland Securities, Inc., Member FINRA and SIPC, Registered with SEC and MSRB, a diversified financial services firm, which includes investment banking, public finance, and full-service broker-dealer divisions, offering investment and finance services for government entities, financial institutions, non-profit organizations, and individual investors.

Wealth Management Investment Representatives work closely with clients to determine and deliver the appropriate solutions to meet their financial needs according to their individual investment profile and situation. Northland is also a SEC Registered Investment Adviser (RIA) - Northland Asset Management - and Investment Adviser Representatives (IARs or Financial Advisors) can offer numerous advisory products and services, including a wide selection of third-party money managers, and fee for financial planning services.