



Jason Soland, CFP®
CERTIFIED FINANCIAL PLANNER™
Professional

**Director of Wealth
Management Services &
Senior Financial Planner**

563-382-1440
jason.soland@lpl.com

About Jason Soland

As a dedicated financial professional since 2007, Jason will work as your LPL Financial Advisor 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

- CFP - CERTIFIED FINANCIAL PLANNER Professional
- FINRA Series 6, 7, 63, and 65 registrations held through LPL Financial
- Life, Health, and Annuity Insurance Licenses in IA, MN, MT and NV
- LUTCF - Life Underwriting Training Council Fellow
- APMA® - Accredited Portfolio Management AdvisorSM
- 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 & Committee Member: 2010 - 2021
- Chamber Volunteer Member: 2010 - Present
- Barthell OES Home Vice President: 2023 - Present
- Married to Jennifer Soland, two daughters, Quinn & Charlie

Our Commitment to You

We are dedicated to helping you pursue your financial dreams by providing personal attention and quality services.

How We Help You Pursue Financial Freedom

We offer comprehensive financial planning, wealth management, cost-efficient portfolio construction, and ongoing discussions to earn your confidence and help you pursue your financial dreams.



at DECORAH BANK & TRUST CO.



202 East Water Street, Decorah, Iowa 52101

www.decorah.bank/wealth

Decorah Bank & Trust Company (Financial Institution) provides referrals to financial professionals of LPL Financial LLC ("LPL") pursuant to an agreement that allows LPL to pay Decorah Bank & Trust Co. for these referrals. This creates an incentive for Decorah Bank & Trust Co. to make these referrals, resulting in a conflict of interest. Decorah Bank & Trust Co. is not a current client of LPL for advisory services.

Please visit <https://www.lpl.com/disclosures/is-lpl-relationship-disclosure.html> or scan the QR code below for more detailed information.



Certified Financial Planner Board of Standards, Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, CFP®  and CFP®  in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Securities and advisory services are offered through LPL Financial (LPL), a registered investment advisor and broker-dealer (member FINRA/SIPC).

Insurance products are offered through LPL or its licensed affiliates. Decorah Bank & Trust Company and Wealth Management Services **are not** registered as a broker-dealer or investment advisor. Registered representatives of LPL offer products and services using Wealth Management Services, and may also be employees of Decorah Bank & Trust Company. These products and services are being offered through LPL or its affiliates, which are separate entities from, and not affiliates of, Decorah Bank & Trust Company or Wealth Management Services. Securities and insurance offered through LPL or its affiliates are:

Not Insured by FDIC or Any Other Government Agency	Not Bank Guaranteed	Not Bank Deposits or Obligations	May Lose Value
--	---------------------	----------------------------------	----------------