Wealth Management Services at DECORAH BANK & TRUST CO.

Tracy J. Dostal, CFP®
CERTIFIED FINANCIAL PLANNER™ Professional

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ABOUT TRACY

Tracy's personal mission is to encourage and inspire her clients to pursue their financial dreams. With more than 30 years of experience in financial services, Tracy uses her extensive planning, investment, and insurance knowledge to tailor personalized strategies that guide the pursuit of your goals and dreams.

Experience & Education

- CERTIFIED FINANCIAL PLANNER™ Professional
- FINRA Series 7, 63, and 66 registrations held through LPL Financial
- Life, Health, and Annuity Insurance Licenses in IA, MN, WI, AK, CO, FL, IL, MD, WA
- Iowa School of Banking
- American College – 2006

Professional Associations

- National Association of Insurance & Financial Advisor
- Million Dollar Round Table*
- Financial Services Institute

Community & Family

- Women, Faith & Finance, Advisory Board
- Winneshiek County Community Foundation Committee
- Aase Haugen Homes Foundation, Board of Directors
  - 2010 - 2022
- Luce-Bergeson Foundation, Board of Directors
  - 2016 - 2022
- Winneshiek Saddle Club
- Married to Wayne Dostal, two sons, Tyler & Cody

*Qualifying membership in the MDRT is based on minimum sales production requirements and gross business generated within a year.

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 Success

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.

Wealth Management Services®
at DECORAH BANK & TRUST CO.

202 East Water Street, Decorah, Iowa 52101
www.decorah.bank/wealth

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