



Tracy J. Dostal, CFP®

CERTIFIED FINANCIAL PLANNER™
Professional

Senior Financial Planner

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About Tracy Dostal

Tracy is dedicated to empowering her clients to help them pursue their financial dreams. Backed by over three decades of expertise in finance, she leverages her extensive knowledge in planning, investments, and insurance to craft personalized strategies designed with a goal to help clients navigate their unique goals and ambitions with confidence.

Experience & Education

- CFP - 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, 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

- 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 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.



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