Jason Soland, CFP®
CERTIFIED FINANCIAL PLANNER™ Professional

563-382-1549
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About Jason Soland

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

- 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, and NV
- LUTCF – Life Underwriting Training Council Fellow
- APMA® – Accredited Portfolio Management Advisor℠
- 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 of Directors: 2010 – 2014
  - Sports Committee: 2010 – 2021
- Chamber Golf Outing Committee: 2010 – 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 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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