



## Joe Swanson, AIF®

Financial Services Representative  
Principal Securities Registered Representative  
Investment Adviser Representative



*Ready to focus on your financial goals? I can help. Your goals — my focus. Let's put the strategies together to work for you. Whether your priority is personal finances, your business, or both, I'm committed to helping you succeed.*

### Let's connect to get started:

Minnesota Business Center  
952-277-4259  
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[Minnetonka, MN 55305](#)

### EXPERIENCE:

Joe Swanson has worked with over 100 employers regarding their plans ranging from startup to \$120,000,000 in plan assets. His background in small-business retirement planning and implementation helps employers manage their Deferred Compensation, 401(k), Pension and ESOP Plans.

Swanson first started in the Financial Services business with Principal in the Summer of 2003.

### EDUCATION & CREDENTIALS:

His past professional activities include the Minneapolis Chamber of Commerce Small-business Committee and the Minnesota State Colleges and Universities (MnSCU), Trustee where he served as the treasurer of MnSCU Board.

### INTERESTS:

Joe resides in Plymouth, MN with his wife Zoe and their two children.

**\*AIF® (Accredited Investment Fiduciary®) is an educational designation only, obtained by the holder by completing the requisite coursework. The AIF Designation does not mean the holder is acting in a fiduciary capacity.**

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