

## James M. Follstad

Financial Services Representative  
Principal Securities Registered Representative  
Investment Adviser Representative



*Seeking control over your financial future?*

*I can help by reviewing your financial picture, and suggesting customized solutions to help you address gaps and prepare for your financial future.*

Let's connect to get started:

(630) 874-6747 – office

(773) 332-9990 - mobile

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[LinkedIn](#) | [Facebook](#) | [Twitter](#)

### EXPERIENCE:

- Committed financial professional for 9+ years
- With Principal® since 2008
- Specialized in helping individuals, union members and businesses set goals and implement strategies to help achieve their financial success

### EDUCATION & CREDENTIALS:

- BBA in Finance – University of Wisconsin - Madison
- FINRA Series 7, 24 and Series 66 securities registrations
- Life and Health Insurance license
- Leaders Edge Conference Qualifier (2015, 2016)

### INTERESTS:

- Spending time with my wife and three children
- Cheering on my favorite collegiate and professional sports teams – Go Badgers!!!
- Being active and involved in the Western Springs, IL community
- Finding time to sneak in the occasional round of golf

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