

Adivsor	Intials
Michael Littledike	ML
Tyler Williamson	TW
Zaccary Call	ZC
Bart Wagstaff	BW
Jayson McGinnnis	JM
Zach Geertsen	ZG
Rinar Erickson	RE
Tyson Long	TL
Tim Gottfredson	TG
Laura Hadley	LH
Rich Gurr	RG
Joe Kent	JK
Tyler Schenk	TS
Joshua Scott	JS
Tanner Smith	TA
Brock Andersen	BA
Alison Frasca	AF
Andrew Angerbauer	AA
Katie Brinkerhoff	KB
Nate Christensen	NC

RM	Advisors	Initials
Melanie Tinling	Jayson & Bart	MS
Carson Strong	Tyson L & Rinar	CS
Danielle Lewis	Zach G & Tim	DL
Tia Hinderliter	Laura & Rich	TH

FS Member	Advisors
140 - Liz Gurrero	Tyson, Rinar
131 - Walker Stahle	Rich, Laura, Brock
144 - Ben Coburn	Joe & Tanner
138 - Zach Newman	Alison, Tyler S, Josh (T,TH)
125 - Bradyn Haderlie	Bart, Jayson & Tyler W
130 - Cris Avila	Zach G, Tim, Andrew
122 - Cristian Haymes	Josh (M,W,F)
150 - Robby Howe	Katie & Nate

First Appointments

What they can bring:

401k Statements, IRA or Roth IRA Statements, Social Security info, Anything else that will help the advisor.

What info we need for calendar:

Type (1st/2nd/delivery/AR) - Where (zoom/phone/office) - Name & Spelling - Number - Email - Referred by

Advisor	AF	BA	NC	KB	AA	JK	RG	TA	TS	JS	ZG	TG	LH	JM	BW	RE	TW	TL	ZT	MT
HHs	107	32	74	69	73	140	90	196	171	177	176	170	193	193	188	124	147	129	15	25
HHs needed	25	45	~100	~100	~100															
	AF	BA	NC	KB	AA	JK	RG	TA	TS	JS	ZG	TG	LH	JM	BW	RE	TW	TL	ZT	MT
100,000	100K	100K	100K	Possible	Possible	100K	100K	100K	100K	100K	100K	100K	100K	100K	100K	100K	100K	100K	100K	100K
200,000	200K	200K	Fill	Fill	Fill	200K	200K	200K	200K	200K	200K	200K	200K	200K	200K	200K	200K	200K	200K	200K
300,000	300K	300K	Fill	Fill	Fill	300K	300K	300K	300K	300K	300K	300K	300K	300K	300K	300K	300K	300K	300K	300K
400,000	Fill	400K	Fill	Fill	Fill	400K	400K	Full, but Open	Full, but Open	Full, but Open	400K	400K	400K							
500,000	Fill	500K	Fill	Fill	Fill	Possible	500K	Full, but Open	Full, but Open	Full, but Open	500K	500K	500K							
600,000	Fill	600K	Fill	Fill	Fill	Possible	600K	Full, but Open	Full, but Open	Full, but Open	600K	600K	600K							
700,000	Fill	Possible	Fill	Possible	Possible	Possible	700K	Full, but Open	Full, but Open	Full, but Open	Full, but Open	700K	700K	700K						
800,000	Possible	Possible	Fill	Possible	Possible	Fill	800K	Full, but Open	800K	800K	800K	800K	800K	800K	800K					
900,000	Possible	Possible	Possible	900K	900K	Fill	900K	Full, but Open	900K	900K	900K	900K	900K	900K	900K					
1,000,000	Possible	Fill	1M	1M	1M	Fill	Possible	Full, but Open	1M	1M	Exception Only	1M	1M	1M						
1,250,000	1.25M	Fill	1.25M	1.25M	1.25M	Fill	Possible	Full, but Open	1.25M	1.25M	Exception Only	1.25M	1.25M	1.25M						
1,500,000	1.5M	Fill	1.5M	1.5M	1.5M	Possible	Possible	1.5M	1.5M	1.5M	Full, but Open	Full, but Open	Full, but Open	Full, but Open	1.5M	Exception Only	Exception Only	1.5M	1.5M	1.5M
1,750,000	1.75M	Fill	1.75M	1.75M	1.75M	Possible	Possible	1.75M	1.75M	1.75M	Full, but Open	Full, but Open	Full, but Open	Full, but Open	1.75M	Exception Only	Exception Only	1.75M	1.75M	1.75M
2,000,000	2M	Fill	2M	2M	2M	2M	Fill	2M	2M	2M	Full, but Open	Exception Only	Exception Only	2M	2M	2M				
3,000,000	3M	Fill	3M	3M	3M	3M	Fill	3M	3M	3M	3M	Full, but Open	Full, but Open	Full, but Open	Full, but Open	Exception Only	Exception Only	3M	3M	3M
4,000,000	4M	Fill	4M	4M	4M	4M	Fill	4M	4M	4M	4M	Full, but Open	4M	Full, but Open	Full, but Open	Exception Only	Exception Only	Exception Only	4M	4M
5,000,000	5M	Fill	5M	5M	5M	5M	Fill	5M	Full, but Open	Exception Only	Exception Only	Exception Only	5M	5M						