

## MERISTEM

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# news release

FOR IMMEDIATE RELEASE



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## **MERISTEM ADDS FINANCIAL PLANNER TO CLIENT ADVISOR ROLE**

### **MERISTEM, A MULTI-FAMILY OFFICE BASED IN MINNETONKA, NAMES NANCY BERGSTROM AS CLIENT ADVISOR.**

TWIN CITIES ▪ June 18, 2008 ▪ Nancy Bergstrom recently joined Meristem, a multi-family office, as a Client Advisor. She brings with her an array of client-relation experience in the fields of investment and portfolio analysis, as well as experience in international equity research, corporate finance, and sales and product training. She will work with Meristem's team of advisors to provide comprehensive wealth management services to Meristem clients.

"Nancy's experience is broad and includes more than 10 years of client relations in the financial planning industry," notes Jerry Johnson, President of the Minnetonka-based Meristem. "She's a welcome addition to our group and a true asset for Meristem clients. Our clients will be well served by Nancy's experience and guidance."

Prior to joining Meristem, Bergstrom handled portfolio management at Windsor Financial Group, trained investment product reps with TCF Investments, and was an Investment Specialist for Charles Schwab & Co. She holds a degree in International Relations with an emphasis in Economics from the University of Wisconsin-Madison and is a Certified Financial Planner.

"I like the fact that we are able to help clients with all aspects of their financial lives and be able to help them to achieve peace of mind through the open architecture of our company and wide range of services." Working with families, from grandparents to grandchildren, is especially satisfying to Bergstrom. "We know the parents' core values and how they would like to see their kids handle their wealth, so they trust us to help facilitate that process."

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*About Meristem: Meristem is a wealth management firm operating in a Multi Family Office platform. Meristem provides a comprehensive menu of financial services for wealthy families and individuals including; wealth management, estate and tax planning, risk management, financial planning and charitable giving.*