NORTH STAR
Resource Group
THE HAUNTY TEAM

# Advice-Based Wealth Management

## Advising Team

**Thomas A. Haunty, CFP®, RHU®, REBC, ChFC®, AIF®**
**Senior Partner & Team Leader**
thomas.haunty@northstarfinancial.com
608.888.9740

Tom is a CERTIFIED FINANCIAL PLANNER™ professional who has provided advice based wealth management services to individuals, families and businesses since 1982. Tom can help you sort through the proper options and strategies to design the retirement of your dreams.

**Kayla A. Nikula**
**Financial Advisor**
kayla.nikula@northstarfinancial.com
608.888.9737

Kayla is a 2010 graduate of the University of Wisconsin-Madison, with a B.S. in Personal Finance. Working with many millennial clients, Kayla strives to help them create the ultimate money multitasking strategy in their cash flow strategies to address their multiple goals.

**Stacey F. Washa**
**Financial Advisor & Practice Manager**
stacey.washa@northstarfinancial.com
608.888.9753

Stacey has been providing exemplary service to The Haunty Team clients since 2008. She takes pride in answering client questions and educating them on investment, insurance, and savings strategies to help them more efficiently reach their accumulation goals.

**Max J. Dowdy**
**Financial Advisor**
max.dowdy@northstarfinancial.com
608.888.9807

Max strives to help clients and their families from all walks of life achieve their financial goals. Throughout his career, Max has come to specialize in helping nurse anesthetists, educators, attorneys, and business owners with their financial planning.

## Our expertise

- Asset Protection Strategies*
- Attorneys
- Business Owners
- College Funding
- Comprehensive Fee-Based Financial Planning
- Debt Management
- Education Funding
- Investments
- Mutual Funds
- Retirement
- Tax Strategies
- Wealth Management

## Support Team - 608.270.9100

**Stacey Reuter**
**Administrative Specialist**
608.888.9772
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**Abigail South**
**Client Support Specialist**
608.888.9765
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**Yolonda Hairston**
**Practice Coordinator**
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Aside from the knowledge and experience you will receive from your advisor, North Star Resource Group provides a team of experts within their specialties dedicated to helping your advisor choose well-suited products or services for you.

## Resource Team

**Chris Sitek, CLTC®, CASL®, CLU®, ChFC®, RHU®, REBC®**
**Vice President, Life Insurance and Long-Term Care**

Chris specializes in insurance brokerage and Long-Term Health Care planning. He helps tailor specific insurance plans for clients to assist in foundational risk management. Chris joined North Star Resource Group after graduating from St. John's University in 1996.

**Chase Brakke, DIA, DIF, CEPA®**
**Vice President of Disability Insurance and Property and Casualty**

Chase helps in evaluating and obtaining specialty specific, individual disability insurance products in order to help ensure that his clients protect and preserve all that they've worked hard to create: home, lifestyle, retirement, etc. Chase joined North Star Resource Group in 2008.

**Sean McTeague, CFP®**
**Financial Planning Specialist**

Sean is a member of our Financial Planning Resource Center and provides a high level of planning support and guidance to North Star associates and their clients. Sean serves clients and financial professionals throughout the country. He holds a B.S in Mechanical and Industrial Engineering from the University of MN Institute of Technology.

**Jeff Landt, CFA, CFP®**
**Vice President and Director of Investments**

Jeff's primary area of expertise is the investment management process. He assists with portfolio strategies, portfolio construction and the best practices of portfolio management. He has been affiliated with North Star Resource Group since 1996.

*Your advisor can also work hand-in-hand with outside tax and legal professional with whom you have an existing relationship or provide referrals to North Star Tax, LLC, Kaufer Law Firm, and other local resources.



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