

History of excellence

North Star Resource Group is a financial services firm helping our clients start and stay the path to financial security. We can help you fund your retirement, become a savvy investor, prepare for the unexpected with insurance, save for your child's college education and much more.

We aren't just an investments firm. We are committed to your complete financial wellness, whatever life may bring.

At North Star, we prioritize...

Investing in our teams

North Star's greatest asset is our employees, and our mission is to equip each advisor and team member with the training and resources necessary for a fulfilling career and life. North Star currently employs over 300 individuals in 39 offices locations across the U.S., and we are always seeking top talent to help support our 140,000 clients.*

- A Star Tribune Top Workplace (2016)
- A Top Entry-Level Employer according to CollegeGrad.com (2016)
- One of the 100 Best Companies to Work For awarded by Minnesota Business Magazine (2015)

Growing in our industry

In the time since Phil Richards acquired North Star in 1969, we have been on a steady path of growth as we diversify and evolve to serve our clients better.

In 1983, we began providing comprehensive investment advisory services under our independent registered investment advisor, which we continue today. Since then, we have also added insurance brokerage, long-term care, employee benefits and tax preparation divisions. In 2007, we aligned with CRI Securities, LLC and Securian Financial Services, Inc. to provide even better service to our clients.

Finally, North Star sponsors a Medical Division, Dental Division and Law Division to support professionals working specifically with certain professions.

Our continued success is a result of nearly a century of growing and adapting in the best interest of our clients.

- One of the Twin Cities Largest Wealth Management Firms according to the Minneapolis St. Paul Business Journal (2020)
- Winner of the Best in Class: Midsize Company Award by Minnesota Business Magazine (2016)
- Member of the Inc. 5000 Fastest Growing Private Companies in the Nation list (2014 and 2015)
- Recipient of the Master Firm Award by GAMA International² (2015 and 2013)

Giving back to our communities

In 2004, North Star began donating 10% of our profits each year to charity, and since then we have given \$5 million to nonprofits through the Scott Richards North Star Foundation.

We also empower our employees to serve in their communities, with paid volunteer time off and by matching charitable donations up to \$500.

- Three-time winner of the Better Business Bureau of Minnesota and North Dakota Torch Awards for Ethics (2019, 2015 and 2011)¹
- An Invest in Others Charitable Champion (2019)
- Two-time finalist Corporate Philanthropy Award by Invest in Others (2016 and 2015)
- Winner of the Minnesota Business Ethics Award for a Mid-Size Company (2015)
- Winner of the Community Leadership Award by InvestmentNews (2010)



North Star Consultants, Inc. – Insurance Products and Services • CRI Securities, LLC – Securities and Investments • Securian Financial Services, Inc. – Variable Products and Securities. Securities and investment advisory services offered through CRI Securities, LLC and Securian Financial Services, Inc. Members FINRA/SIPC. CRI Securities, LLC is affiliated with Securian Financial Services, Inc. and North Star Resource Group. North Star Consultants, Inc. is doing business as North Star Resource Group and is independently owned and operated. 2701 University Avenue SE, Minneapolis, MN 55414. 3045757/DOFU 04-2020

¹ Awards are based primarily on criteria relative to leadership, achievement, recruiting, management practices, community service, team unity and education. Sales are not a consideration. There is no fee associated with this award. Companies must be in good standing with the Better Business Bureau for consideration. Working with this advisor or firm is not a guarantee of future financial results. Investors should conduct their own evaluation.

² GAMA International is a membership organization for which individuals must submit applications and payment. The organization is geared toward those in a recruiting, training, or supervision role in the financial services industry. Awards are based primarily on -commissions, premiums, or fees generated from investment and insurance products and other criteria relative to leadership, achievement, and recruiting selected by the applicant. Individuals must be current with membership dues and submit an application fee for consideration. Working with this individual is not a guarantee of future financial results. Investors should conduct their own evaluation.

North Star/OT, LLC – Tax preparation and advice are offered only through North Star/OT, LLC. These tax services are not offered through Securian Financial Services, Inc. or CRI Securities, LLC.

*As of 12/31/19