

# Cherry Tree Wealth Management



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## JUSTIN FRY'S

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Justin has worked extensively in the areas of asset management, retirement preparation, investment planning and insurance planning. Having been in the business for more than 21 years, he has been proud to have been a financial advisor, a branch manager, a practice development specialist, and was fortunate to recruit, train and work with some of the best financial advisors in the business.

Justin takes a disciplined approach to addressing the 13 wealth management issues he believes are critical to help create and grow wealth, protect and preserve the wealth you have, transfer excess wealth during a life, and pass wealth on through your estate.

Justin resides in Wayzata with his wife Ellen and three children; Milly (13) Lulu (9) and Greta (2). He enjoys golf, skiing, Vikings and Badger football and proudly witnesses his daughters dance, lacrosse, hockey and skiing success.

### ✿ FOCUS

- Managing client portfolios and client service
- Client investment education
- Customized portfolio design
- Helping people reach their financial goals

### ✿ PRIOR EXPERIENCE

- Financial Consultant, E\*TRADE
- District Manager, Waddell & Reed
- Senior VP and Branch Manager, Ziegler Financial
- Divisional VP Sales/Financial Advisor, Questar Capital Corporation/Allianz Life Insurance
- Financial Advisor, Wells Fargo/Wachovia

### ✿ EDUCATION

- Bachelor of Science (B.S.), Economics, University of Wisconsin-Madison