

## News Release

### LarsonAllen Financial Principals Earn Top Honor

*For immediate release*

**MINNEAPOLIS—January 5, 2010**—Nick Houle and Mike McConnell, principals with LarsonAllen Financial, LLC, have been honored as Five Star Wealth Managers by *Twin Cities Business* magazine (January 2010). Less than 7 percent of wealth managers in the market earn the award. The honorees are chosen by a survey of more than 3,000 independent financial services professionals and approximately 35,000 high-net-worth residents in the Twin Cities area. Recipients must have more than five years of experience to be eligible.

“I am pleased to see two of our best advisors recognized for their unique capabilities and commitment in serving the complex needs of our clients,” says Tony Hallada, principal-in-charge of LarsonAllen Financial. “Mike and Nick are in a category of their own in regards to experience and ability to serve high net worth families and closely held business owners.”

Houle specializes in financial planning, income and transfer (gift and estate) tax planning, and tax compliance for high net worth individuals and their families. He leads the firm’s gift and estate tax specialty group. Houle holds a Master of Taxation degree and designations as a certified public accountant (CPA), certified financial planner (CFP), personal financial specialist (PFS), and registered investment advisor representative (Series 65).

McConnell focuses on business succession planning, financial planning, estate planning, investment management, life and health insurance, and mergers and acquisitions. He holds certified public accountant (CPA), certified financial planner (CFP), and personal financial specialist (PFS) designations. McConnell

is also a licensed securities principal (Series 24), a registered investment advisor representative (Series 65), and a licensed life and health insurance agent.

The independent evaluator Crescendo Business Services asked survey respondents to measure only wealth managers with whom they had personal experience. They were also asked to assess the managers based on customer service, integrity, knowledge/expertise, communication, value for fee charged, meeting of financial objectives, post-sale service, quality of recommendations, and overall satisfaction. Wealth managers were also reviewed for regulatory actions, civil judicial actions, and customer complaints as reported by regulatory agencies. Finally, the honorees were reviewed by a blue-ribbon panel composed of individuals within the financial services industry.

LarsonAllen Financial, LLC, member FINRA & SIPC, offers total wealth management including financial and estate planning, tax, asset management, succession planning, and risk management and insurance. Founded in 1994, LarsonAllen Financial is recognized as one of the nation's top wealth advisors by Bloomberg's *Wealth Manager* magazine (July/August 2007, 2008, and 2009) and Goldline Research. LarsonAllen Financial has \$1.5 billion in assets under management. Offices are located in Eau Claire, Minneapolis, Philadelphia, Phoenix, and St. Louis. LarsonAllen Financial is a company of LarsonAllen LLP (LarsonAllen), a professional service firm that provides assurance, accounting, tax, consulting, and advisory services to organizations and individuals managing business ventures and finance.

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