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TWO MINNESOTA AREA WEALTH ADVISORS RECEIVE 2021 FIVE STAR WEALTH MANAGEMENT AWARD

Two Minnesota-based wealth advisors at BerganKDV earned the 2021 Five Star Wealth Management award. Bloomington advisor Sam Rouman, CFP®, CLU, ChFC, AIF® and St. Cloud advisor Becca Oelrich, CFP® received this year's award.

Five Star Professional uses its own proprietary research methodology to name outstanding professionals in the Twin Cities market as award winners. The objective is to recognize wealth management professionals who show a commitment to clients, demonstrate strong industry credentials, and are evaluated on the quality of their current practice. Candidates are nominated by their peers and firms and are evaluated on ten criteria including: client retention rate, client assets administered, number of client households served and education and professional designations.

"Becca and Sam are dedicated team players that continue to provide a wow experience to our clients," said Wealth Management Solutions Leader Matt Cosgriff, CFP®, "Their immense commitment to excellence and customer service does not go unnoticed, and everyone at the firm appreciates what they do every day. It is wonderful for our teammates to be recognized by their respective peers."

This is Sam's third time receiving this award and Becca's second win. BerganKDV sincerely congratulates these two for their dedication to their field and for striving to provide the best service to our clients.

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About BerganKDV: BerganKDV is a leading professional services firm with a contagious culture; where growth is fostered and making a difference means something. Our values drive our decisions, and our passion is empowering people and creating a wow experience for our clients.

Powered by people who do business the Midwest way, BerganKDV delivers comprehensive business, financial and technology solutions including business planning and consulting, tax, assurance and accounting, technology, workforce management, wealth management and turnaround management services.

