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Who I Am

Jon Marker, CLU®

Jon Marker is a financial representative with Foster Klima & Company and independent financial advisor. He combines his 24 years of experience in the financial services industry with his passion for helping to create individually tailored financial solutions for business owners, professionals, and their families. Through insurance, succession planning, legacy planning, and other financial services, Jon strives to provide specialized guidance for a lifetime of financial security.

As a Chartered Life Underwriter® (CLU®), he has an in-depth knowledge of the insurance and risk management needs of individuals, business owners, and professionals. A lifelong Minneapolis, Minnesota resident, he specializes in serving successful and family-oriented business owners and professionals throughout the Twin Cities. To learn more, visit **www.jonmarker.com**, call 612-746-2261, or connect with Jon on **LinkedIn**.

Why I Became a Financial Advisor

I like to think that business runs in my blood. Both of my grandfathers owned businesses and my father worked at his father's business before taking it over. I too helped out working in the store and saw firsthand the dynamics of running a family business and the unique needs of businesses, such as succession plans, insurance, and other financial strategies. Coming from a family of business owners, I was inspired to pursue a career that would allow me to help family businesses avoid such common problems.

My Career Today

Today, I'm a financial advisor who has spent the last 24 years building my career serving business owners, professionals, and families with successful financial solutions individually tailored to their specific needs and objectives.

As an advisor with a large and sophisticated company, I have access to a vast network of resources to help businesses and other professionals and families. I like to view myself as both a financial advisor and a support system. I build strong and trusted relationships with my clients by offering them objective guidance and unbiased advice whenever they have questions or seek insight.

Based on my personal history and decades of experience, I am well qualified to help business owners and professionals, as I understand the unique challenges they face in their careers. Beyond developing financial security for themselves, they also want to take care of and protect their business and family.

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How I Can Help

What I Do and How I Can Help

Money may seem strictly analytical, but it plays a signficant role in people's emotional lives. These emotions can negatively impact our financial decisions. Even though finances are the first thing people worry about, they're also the last thing they feel comfortable talking about. This is why it's so important to find an advisor you trust, respect, and want to work with for the long-term.

What I Do

I work hard to listen to your desires and devise a comprehensive strategy that addresses all elements of your financial, personal, and business life and any potential issues that could affect your outcomes. While every plan is unique, I address multiple concerns and needs, including retirement planning, succession planning, legacy planning, and insurance. Once your strategies are in place, we stay in frequent communication, whether it's reviewing your plan and making updates or answering any questions you have.

How I Can Help

Ultimately, I strive to instill a sense of confidence and arm my clients with a comprehensive plan that incorporates both their immediate and long-term goals. We aim to create a plan to successfully transition from where they are today to where they seek to be in the future.

There is nothing more satisfying or fulfilling in my job than seeing my clients reach a goal or successfully tackle a financial milestone. I enjoy meeting with business owners and professionals to learn about their goals and see if I may be able to help. To schedule a complimentary financial consultation, or to get a second opinion on your current strategies, contact our office today by calling 612-746-2261.

Contact

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