



JL Smith is Thrilled to Introduce a New Lead Advisor and Location

Minneapolis, MN – January 29, 2024 – We are thrilled to introduce esteemed advisor, Seth Meisler, CFA, CFP®, CPA/PFS as the latest addition to our team at JL Smith Holistic Wealth Management. Not only does Seth bring 17 years of experience and knowledge as a financial advisor and Chief Investment Officer, but he will also help us extend our firm's reach by acting as a Lead Advisor at our new JL Smith office in Minneapolis, Minnesota.

Like us, Seth is committed to helping clients achieve their financial goals through strategic financial planning, tax planning and management, as well as investment management solutions. He also shares our mission: in his words, "to simplify complex financial issues and guide individuals and their families toward living their best lives."

Meisler joined our practice in late December of 2023 and is already helping us broaden our strengths, particularly through his specialty providing tax-efficient approaches to wealth management for high-net-worth individuals with more complex needs.

Seth comes to JL Smith as a highly credentialed financial professional, holding the titles of Chartered Financial Analyst (CFA), CERTIFIED FINANCIAL PLANNER® (CFP®), and certified public accountant (CPA) with a Personal Finance Specialist (PFS) sub-specialty. He earned his Master of Business Administration (MBA) from DePaul University and his Bachelor of Business Administration (BBA) from the University of Michigan, Ann Arbor.

Seth's dedication to excellence extends to his memberships in key industry organizations. He is an active member of the CFA Institute of Minnesota (CFAMN), the Minnesota Society of CPAs (MNCPA), the Financial Planning Association of Minnesota (FPAMN), and the American Institute of Certified Public Accountants (AICPA). Seth also holds membership in Ed Slott's Master Elite IRA Advisory Group, where he continually hones his expertise in IRAs, providing invaluable tax and distribution strategies for his clients.

Beyond his professional accomplishments, Seth is a family man with a loving spouse and three wonderful children. Together, they call the vibrant Minneapolis area their home. As a passionate advocate for community engagement, Seth actively participates in various committees and serves on the board of Six Points Theater. In his leisure time, Seth enjoys exploring the outdoors, with biking and cross-country skiing ranking among his favorite pursuits.

The addition of Seth to JL Smith is an exciting development for our practice. His extensive background and commitment to helping clients grow and protect their wealth align

seamlessly with our firm's mission and values to act in their best interest. Our entire team at JL Smith looks forward to the positive impact Seth will have on new clients and the community we now serve in The North Star State!

For more information about Seth Meisler and JL Smith, please visit www.jlsmithgroup.com.