

INTEGRATED EQUITY MANAGEMENT

Very Special Thank You to IEM Clients!

The beginning of 2020 has been unexpected to say the least. The continued faith and trust that you've shown us over the last three months has been immensely appreciated, and we cannot express our gratitude enough.

Our Private Wealth Managers wanted to take a moment to express their thoughts, and show their appreciation for your ongoing belief and confidence in our team:

Ted Smith

The many challenges we have all encountered have reminded me of how grateful I am for you, your trust in us, and for our team. Thank you for allowing us the privilege to be your partners in all times. I am humbled and gratified by your steadfastness. Our IEM team looks forward to many more years of service to you.

Danica Goshert

Thank you for allowing us to be on this journey with you and your family - I'm honored and humbled to be a part of it. Since our colleagues have also been working in separate locations, I want you to know that talking with you has often been the highlight of my day, too! And a special thank you for being brave enough to appear on camera for a meeting in whatever you happened to be wearing (yes, even your pajamas).

Charley Stewart

This year we have witnessed and experienced situations new to us. On top of having to confront a volatile stock market, you have also had to deal with potential health issues for family, friends, and loved ones. Despite your own worries, many of you have reached out to make sure our team is doing well. Rest assured, we are fine and remain here for you. Thank you for caring about us, and for your continued trust, support, and loyalty. I have the good fortune to continue to work with you, and I am excited for what lies ahead.

Dan LaNasa

Thank you for your understanding, patience, and trust, as we work through these unique times together. I believe in the importance of turning negative situations into positive ones. I hope that we can all look back on these times and reflect on how we came together as friends, families, and communities to help each other. I look forward to continuing to help all of you in any way that I can.

thank you!



Welcome to the Advisory Team, Garrett Williamson!

Over the past 15 months, Garrett has been an exceptional and valuable member of our IEM team. As an Associate Private Wealth Manager, Garrett partners with our Private Wealth Manager team serving our clients and providing holistic financial advice. Garrett is committed to uplift his clients through education and actionable ideas to meet their goals and has more than nine years of financial industry experience. He has a dedication for financial planning and going the extra mile to get things done.

Education and Experience

Garrett has a BA from Augsburg University in Minneapolis, double majoring in Finance and Business Management. He holds his FINRA Series 6, 7, 63, and 65 securities registrations and his Minnesota State Insurance License for Accident, Life, and Health. He holds the CERTIFIED FINANCIAL

PLANNER™ designation to help provide further value to our clients.

Personal

Garrett lives in Saint Anthony, Minnesota, with his wife Abbey and their French Bulldog, Roman. He enjoys working on his classic truck, motorcycling, mountain biking, and going on walks with his wife in the summer, along with traveling as much as he can throughout the country and abroad.

IEM Philanthropy

Jersey Mike's

IEM has partnered with Jersey Mike's to deliver over 300 sandwiches to healthcare workers and assisted living facilities in the Twin Cities.

Special thank you to Jersey Mike's - Edina for their collaboration in making this happen!



Start Reading Now

For the third year in a row, IEM will be hosting and funding a book fair to encourage summer reading for 1st, 2nd, and 3rd graders at Minneapolis schools.

The event will take on a different form this year given the distance learning being practiced throughout Minnesota schools, but we are excited to support students by mailing 8 books to their homes! Follow the link below for more information on the program.

[Start Reading Now](#)

What's Ahead!

We are still in a fully remote work environment, but have begun to consider what re-opening would look like - to protect the safety of our clients and our team. For everyone's well-being, we will not be opening up the office to clients before June 1st, but will continue to offer virtual Zoom meetings, and phone calls.

We will keep everyone in the loop as we receive guidance from Governor Walz, and the State of Minnesota.

In addition to re-opening the office, keep an eye out for a refreshed IEM website coming later this month!

Best wishes,

Ted Smith, Danica Goshert, Charles Stewart, Dan LaNasa, Garrett Williamson, and Your IEM Team

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