

**List Name: LEADING PROVIDERS – WEALTH MANAGERS OF THE GREAT LAKES**  
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**The following firms were among those interviewed by Goldline Research as part of the research process for the aforementioned list.**

McNellis Bjork

Wade Financial Group

Creative Financial Design

D3 Financial Counselors

Endura Financial

FPS Financial

Gresham Partners

Manifest Destinies

Schoenberg, Kosel & Hjort

I AM Financial

Independent Wealth Management

Artifex Financial

Klaas Financial

Raymond James Financial Services

Olson Weiss

Poehling Capital Management

Retirement Planning Navigators

Scott W. Bingham

SS&G

Sycamore Financial Group

The Windsor Group

TrustVigil