

Intellectual Capital

As an ensemble, the team at Gilbert & Cook provides you the support and experience to best suit your needs throughout your entire financial journey. When you begin your relationship with Gilbert & Cook, you are paired with a Lead Advisor and a Relationship Manager to personally monitor your situation and assist in your day-to-day needs. Additional team members with experience in financial planning and investment strategy are pulled in to focus on specific needs as your life transitions and your financial situation evolves.

Certified Financial Planner®

Linda Cook, CFP®	Jessi Swaim, CFP®
Megan Rosenstiel, CFP®	Michelle Miller, CFP®
Jerit Tripp, CFP®	Todd Henningsen, CFP®
Jarret Sheets, CFP®	Thomas McCaffrey, CFP®
Reece Oleson, CFP®	Zach Ripka, CFP®
Cristi Setchell, CFP®	Ryan Lamoureux, CFP®
Tiffany Scharfenkamp, CFP®	

Chartered Financial Analyst

Chris Cook, CFA	Todd Henningsen, CFA
Brandon Grimm, CFA	Blake Holtmeier, CFA
Thomas McCaffrey, CFA	Kate Gudgel, CFA
Hayden Zeidler, CFA	

Certified Public Accountant

Chris Cook, CPA
Al Ryerson, CPA
Zach Ripka, CPA
Ryan Boatman CPA

Chartered Retirement Plan Specialist®

Jerit Tripp, CRPS®

Certified Divorce Financial Analyst®

Megan Rosenstiel, CDFA®
Al Ryerson, CDFA®
Zach Ripka, CDFA®
Michelle Miller, CDFA®

Certified Wealth Strategist

Jerit Tripp, CWS®

Certified Plan Fiduciary Advisor

Jarret Sheets, CPFA™
Jerit Tripp, CPFA™

Certified Exit Planning Advisor

Reece Oleson, CEPA
Zach Ripka, CEPA
Jessi Swaim, CEPA
Jerit Tripp, CEPA

Accredited Domestic Partnership Advisor®

Megan Rosenstiel, ADPA®

Accredited Wealth Management Advisor®

Megan Rosenstiel, AWMA®

Master of Accountancy

Ryan Boatman, MAcc

Long-Term Care Professional

Megan Rosenstiel, LTCP

Retirement Income Certified Professional®

Reece Oleson, RICP®

Professionals with a Masters Degree

Brandon Grimm, MBA

Professionals Licensed in Life & Health Insurance

Linda Cook	Megan Rosenstiel	Al Ryerson
Jessi Swaim	Jerit Tripp	Reece Oleson
Jarret Sheets	Cristi Setchell	Michelle Miller

5058 GRAND RIDGE DRIVE • WEST DES MOINES, IA 50265 • 515.270.6444 • WWW.GILBERTCOOK.COM

Advisory Services offered through Gilbert & Cook, Inc. a Registered Investment Adviser. SEC registration does not constitute an endorsement of the firm by the Commission nor does it indicate that the adviser has attained a particular level of skill or ability. Advisory services are only offered to clients or prospective clients where Gilbert & Cook, Inc. and its representatives are properly licensed or exempt from licensure. Past performance is no guarantee of future returns. Investing involves risk and possible loss of principal capital. No advice may be rendered by Gilbert & Cook, Inc. unless a client service agreement is in place. Gilbert & Cook, Inc. does not offer tax or legal advice. Consult with an attorney for legal advice and a qualified tax professional for tax advice.