

Your Gilbert & Cook Abundance Team

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

ADVISORS

Your Primary Advisor's knowledge and experience can help transform complex planning and investment strategies into the Life of Abundance you deserve.



Linda Cook
CFP®



Megan Rosenstiel
CFP®, CDFA®, AWMA®, ADPA®, LTCP



Jerit Tripp
CFP®, CRPS®, CWS®,
CEPA, CPFA™



Jessi Swaim
CFP®, CEPA



Jarret Sheets
CFP®, CPFA™



Michelle Miller
CFP®, CDFA®



Todd Henningsen,
CFA, CFP®



Ryan Lamoureux
CFP® - Associate Advisor

SERVICE TEAM

Relationship Managers are invested in genuine relationships and serve as your primary liaison and financial concierge.



Stephanie Duis
Director of Client Service



Cristi Setchell,
CFP®
Senior Relationship Manager



Amanda Gieseke
Senior Relationship Manager



Leah Foley
Senior Relationship Manager



Evan Owen
Relationship Manager



Brittney Strader
Relationship Manager



Lauren Wilgenbusch
Relationship Manager



Jeremy Weeks
Relationship Manager



Michael Vitori
Relationship Manager

SOPHISTICATED STRATEGISTS

As an ensemble, the team works together to evaluate the variables of your unique wealth position by utilizing sophisticated planning and investment strategies to deliver objective wealth management services for your financial security.



Chris Cook
CPA, CFA
Chief Investment Strategist



Zach Ripka
CFP®, CPA/PFS, CEPA
Chief Operating Officer



Brandon Grimm
MBA, CFA,
Chief Investment Officer



Al Ryerson
CPA, ASA, CDFA®
Lead Strategist



Reece Oleson
CFP®, RICP®, CEPA
Director of Financial Planning



Thomas McCaffrey
CFA, CFP®
Portfolio Manager



Kate Gudgel, CFA
Director of Research
and Investor Relations



Hayden Zeidler
CFA
Senior Investment Analyst



Ryan Boatman
CPA, MAcc
Senior Tax Strategist



Blake Holtmeier
CFA
Senior Investment Analyst



Tiffany Scharfenkamp
CFP®
Financial Planner

Your financial success relies on the choices you make - and the people you trust.

For over two decades, individuals and families have put their wealth to work with Gilbert & Cook - accomplishing financial goals, enhancing life experiences, and living a life of abundance.

As an independent Registered Investment Advisor, Gilbert & Cook acts as a fiduciary to clients while offering personalized advice when addressing their complex and unique needs. Our independence allows us flexibility in investment options, customization to your family's mission, and provides you with access to global investment opportunities.

Who We Serve

Individuals & Families

We provide high net-worth individuals and families with Sophisticated Strategies and Genuine Relationships, creating a truly Unique Experience.

Lives in Transition

Navigating through life's many transitions and complex choices, we provide high net-worth individuals and families with clarity around the choices they face and the confidence needed to make important wealth decisions.

Areas of Transition: Wealth Accumulation, Estate Planning, Retirement Planning, Business Consultation and Succession Planning, and Divorce Financial Planning.

Sophisticated Strategies

Planning

Retirement / Income Strategies
Survivorship & Insurance Analysis
Life—Disability—Long Term Care
College Funding Analysis
Spousal Continuity Planning
Charitable Giving Strategies
Estate Settlement Strategies
Windfall Strategies

Investments

Portfolio Analysis
401k Advisory Services
Retirement Plans
Asset Allocation Strategies
Alternative Investments

Specialty Services

Private Family Services
Divorce Financial Planning
Divorce After-Care
Business Consultation
Business Transition Planning
Succession Planning
Second Opinion Service