

FOR IMMEDIATE RELEASE

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Jan Grimm Earns CERTIFIED FINANCIAL PLANNER™ Certification
Jan Grimm earns certification of CFP® and is promoted to Officer of Ixonía Bank

Hartland – February 2019: Jan Grimm, CFP®, LPL Financial Advisor with Ixonía Wealth Management at Ixonía Bank, has been authorized by the Certified Financial Planner Board of Standards (CFP Board) to use the CERTIFIED FINANCIAL PLANNER™ and CFP® certification marks in accordance with CFP Board certification and renewal requirements.

“We’re so proud of Jan’s accomplishment. The rigorous process to successfully complete the education, examination, experience and ethical requirements set forth by the CFP® Board will further assure existing and future clients they are working with a professional financial planner,” stated Dan Westrope, Chairman & CEO of Ixonía Bank. “Earning this credential represents Jan’s commitment in acting as a ‘fiduciary’ – placing the clients’ interests ahead of her own at all time.”

In addition to her recent certification, she has recently been promoted by the Ixonía Bank Board of Directors as an Officer of Ixonía Bank. She is a valuable asset to the Bank and to the Ixonía Wealth Management Team as a successful, trusted Financial Advisor; as well as, serving as part of leadership team for Ixonía Bank’s Women in Business Speaker Series which focuses on supporting women business owners and leaders in professional and personal growth.

Jan has been with Ixonía Wealth Management since December 2015 and has worked as a licensed financial professional since 2000. She holds the Series 7 and 66 Registrations with LPL Financial, as well as Life, Health, and Annuity licenses. She can assist individuals, families and small businesses with a multitude of financial products as well as comprehensive financial planning and advisory services.

Jan’s office is based out of Ixonía Bank’s Hartland office located at 3201 Village Square Drive, Hartland, Wisconsin.

The CFP® marks identify those individuals who have met the rigorous experience and ethical requirements of the CFP Board, have successfully completed financial planning coursework and have passed the CFP® Certification Examination covering the following areas: the financial planning process, risk management, investments, tax planning and management, retirement and employee benefits, and estate planning. CFP® professionals also agree to meet ongoing continuing education requirements and to uphold CFP Board’s *Code of Ethics and Professional Responsibility, Rules of Conduct and Financial Planning Practice Standards*.

About CFP Board – CFP Board is a nonprofit certification organization with a mission to benefit the public by granting the CFP® certification and upholding it as the recognized standard of excellence for personal financial planning. CFP Board owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with plaque design) and CFP (with flame design) in the U.S.,

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which it awards to individuals who successfully complete initial and ongoing certification requirements. CFP Board currently authorizes more than 80,000 individuals to use these marks in the United States. For more about CFP Board, visit www.CFP.net.

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About Ixonía Bank – *For 100 years, Ixonía Bank has been offering a full suite of business banking products and an array of financial services including personal checking, savings, loans, and wealth management services. Ixonía Bank was established in 1918 in Ixonía, Wisconsin; since then the Bank has grown to offer services at seven locations throughout Waukesha and Jefferson Counties. To learn more about Ixonía Bank, please visit the Bank’s website at www.ixoniabank.com.*

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