



Compass
Financial Group

Compass Financial Group

Family Owned Financial Advisers

PROVIDING DIRECTION FOR YOUR FINANCIAL GOALS

CONTACT US

(605) 338-7150

Independent & Local

Compass Financial Group is a locally owned family business. We are also an independent Registered Investment Adviser (RIA). This means we can hand-pick the best products and investments for your financial needs. We are not locked into proprietary products and have no loyalty to anyone other than our clients.

Experience

Compass Financial Group has been doing business in the Sioux Falls area for over 35 years. As Financial Advisers, John, Jesse, and Jasen are able to help you with your financial needs. John Haller, Jesse Haller, and Jasen Haller are all Certified Financial Planner™ certificants and Jasen and Jesse Haller are both Dave Ramsey SmartVestor Pros. Jesse Haller is an Endorsed Local Provider (ELP). Compass Financial Group is a family-owned and operated company.

INDEPENDENT RIA OVERVIEW

Holistic Planning

We focus on your entire financial picture meaning we can handle your investments, insurance needs, and will guide you as we can in many other areas. We incorporate the following products and services into a prudent financial plan that cover a range of services. To see a list of services please visit the services page in the banner above.

Professional Connections

CERTIFIED FINANCIAL PLANNER™ (CFP®) Certificants



John, Jesse, and Jasen are all CERTIFIED FINANCIAL PLANNER™ (CFP®) certificants. The CFP Board is a nonprofit organization acting in the public interest by promoting the value of

professional, competent, and ethical financial planning services, as represented by those who have attained the certification. The CFP board sets and enforces the requirements to maintain this certification, which must be met and through continued education and examination set forth by the Board.

Dave Ramsey ELP & SmartVestor



Jasen and Jesse both are SmartVestor pros through the Dave Ramsey program. SmartVestors are held to a high standard of excellence. Our performance as SmartVestors is evaluated on a monthly basis through client surveys and the Dave Ramsey Team to make sure we are providing you with the best service and advice. As SmartVestors, we have Dave's endorsement – an invaluable asset to us and our clients.

Jesse is the Dave Ramsey ELP for Long Term Care Products. Just like SmartVestors, ELPs are held to a high standard of performance.

SMARTVESTOR LINK

TD Ameritrade



TD Ameritrade is our primary brokerage firm. We work closely with their team to provide optimal service for our clients. They are one of the largest brokerage firms in the United States and provide great value to Compass Financial Group and our clients. Being independent allows us to use nearly any brokerage firm in the United States – only after a thorough investigation did we choose TD Ameritrade as our main custodian.

TD AMERITRADE LOGIN

Compass eMoney Portal



We partnered with eMoney to provide a single location for all of your financial data. This tool allows you to connect all of your financial accounts into a single, secure location. No more hunting for what you have or remembering usernames and passwords for every website.

COMPASS EMONEY LOGIN

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COMPASS EMONEY PORTAL

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