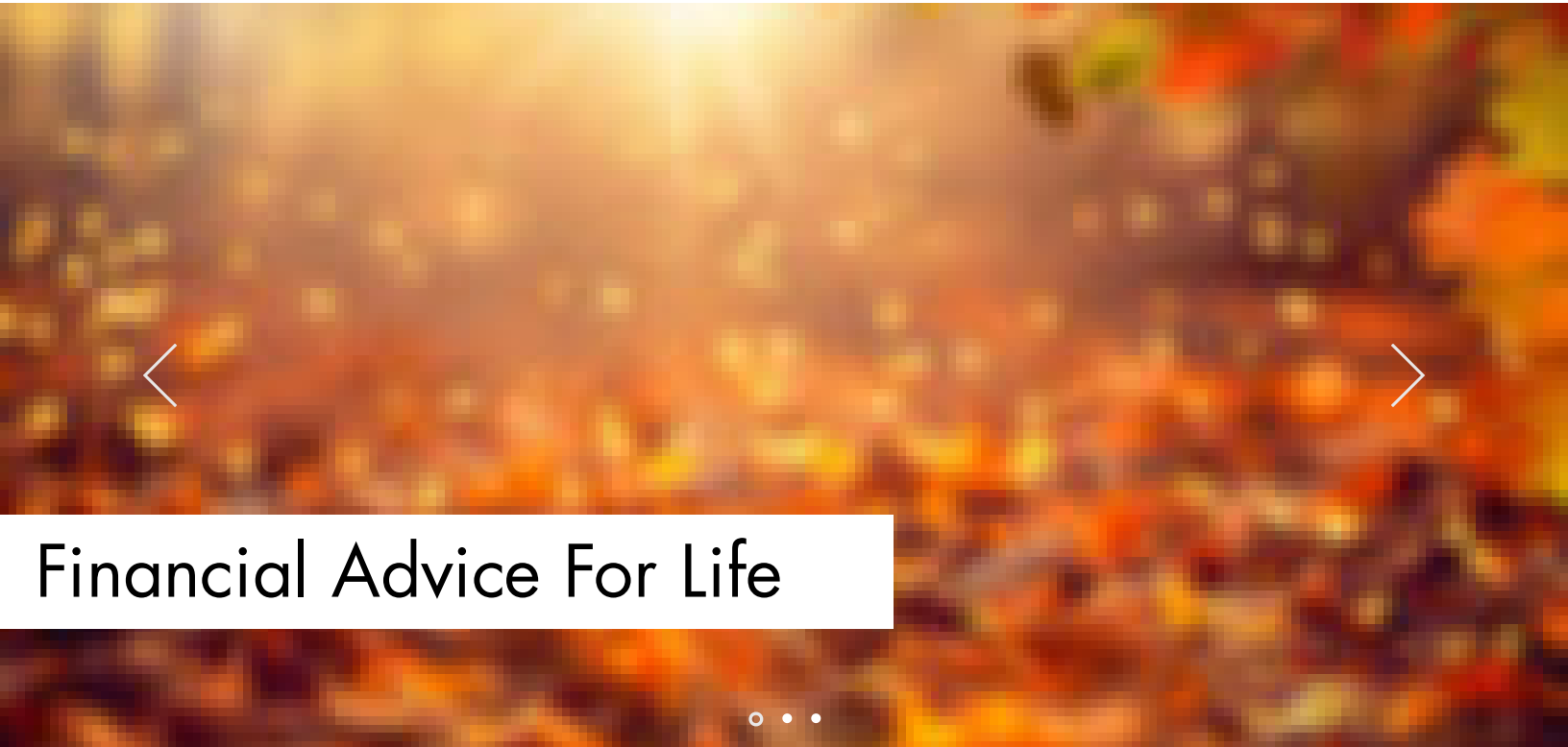




SilverOak
HEALTH MANAGEMENT LLC



Financial Advice For Life

The SilverOak Advantage

SilverOak Wealth Management LLC is a fee-only, Minneapolis/St. Paul-based independent wealth management firm and Registered Investment Advisor (RIA).

As a premier financial planning and wealth management company, our goal is to improve the quality of our clients' lives by assisting them in successfully attaining their personal and business financial objectives.

We are committed to our clients and the achievement of their dreams - not just today but well into the future - creating a secure foundation for generations to come.

How We Earn Your Trust

- We are fee-only and therefore we do not sell any products or receive any commissions
- We have a fiduciary relationship with all of our clients - your interests always come first
- Our advisors have extensive experience and various professional designations across multiple personal finance disciplines.

Client Announcements

Newsletter Posted

SilverOak's First Quarter 2019 Newsletter has been posted. Click on the SilverOak Newsletters link to view.

[Newsletters](#)

Webinar Posted

SilverOak's Quarterly Market Update webinar was recently held on April 26, 2019. Click on the SilverOak Webinars link

- We conduct thorough internal due diligence on all of our investments to view.
- Our customized planning solutions are continually monitored and revised on your changing needs
- We build long-term relationships with clients
- We are happy to coordinate with other advisors and professionals you work with, including estate attorneys and accountants

[Webinars](#)

[Performance Reports](#)

2019 First Quarter Performance Reports are posted to your Client Portal.

[Client Login](#)

[Whitepapers](#)

Click here to read our recent Whitepaper on SilverOak's comprehensive services.

[Whitepapers](#)

Typical Questions We Address

- Am I saving enough for retirement?
- How do I minimize income taxes?
- Do I have the right types of insurance?
- Are my wills and estate plans properly structured and achieving my desired goals?
- Am I maximizing my company benefits?
- How do I diversify my company stock?
- Can I afford a retirement home?
- What else should I be thinking about?

What You Can Expect From Us

- Proactive relationship
- In-depth understanding of your finances
- Interaction based on your needs and schedule
- Unbiased and independent advice
- Specific investment advice, including access to an institutional brokerage account
- Truly comprehensive planning

To learn more about how SilverOak Wealth Management can get you started on your journey to financial freedom, please click below.

[About SilverOak](#)

Our Services

Community Involvement



In May 2019, the SilverOak team volunteered at Feed My Starving Children, packing nutritious meals to be sent around the world to those in need.



In December 2018, SilverOak team members volunteered at Toys for Tots, sorting toys to be given to children in need throughout the Twin Cities.



In October 2018, SilverOak sponsored a client event at the Minnesota Horse & Hunt Club to raise funds for Children's Hospital Minnesota.

Be sure to read about other volunteering opportunities our team has had on the Community Involvement page.

Community Involvement

Awards & Recognition

- For the fourth consecutive year, SilverOak was named a Financial Times Top 300 Investment Advisor in 2018.
- Since 2010, SilverOak's advisors have consistently been recognized as Five Star Wealth Managers.
- SilverOak was listed in AdvisoryHQ's Top 11 Best Financial Advisors in Minneapolis, St. Paul, and Edina in 2019.
- SilverOak was ranked #8 on CNBC's 2014 national list of the Top 100 Fee-Only Wealth Management Firms.



Shannon, Kim, Jonathan & Nick were named 2019 Five Star Wealth Managers!
[Click Here](#) to view the official announcement.

For a complete list of awards SilverOak has received over the years, please see our Awards & Recognition page below.

Interested in learning more about SilverOak?

Contact Us

Send

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