



Jason Mahn, CPA

Vice President, Advice Strategy & Advisor, Personal Office®

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With over 7 years of experience as a Certified Public Accountant in Big 4 public accounting and private wealth management, Jason serves as a trusted advisor to families and business owners.

Jason has comprehensive knowledge in retirement, estate and tax planning and works with a team of specialized professionals at NorthRock Partners to manage the complexity of his clients' financial lives and deliver a streamlined Personal Office® experience.

Jason is a graduate of the University of Wisconsin - Eau Claire, where he received Bachelor's degrees in Finance and Accounting. He and his wife, Missy, live in Neenah, Wisconsin, with their son, Theo, daughter, Hattie and chocolate lab, Hank. They love the outdoors, being up north at the cabin and spending time with family and friends.

PROFESSIONAL DESIGNATIONS AND ASSOCIATIONS

- ✓ Bachelor of Science, Business Administration – Finance
University of Wisconsin - Eau Claire
- ✓ Bachelor of Science, Business Administration – Accounting
University of Wisconsin - Eau Claire
- ✓ Certified Public Accountant - Wisconsin

PROFESSIONAL AND COMMUNITY INVOLVEMENT

- ✓ Member of AICPA