STRELLNER
FINANCIAL GROUP
A CFG Member Office

Tim Strellner

<u>Business:</u>

How long have you been in the business?

I started in the business in 1986 on a twin career basis while teaching and coaching baseball at Muscatine Community College.

Why did you want to become an advisor / Why should anyone else want to be an advisor?

The why for me was very simple. Firstly, it was about supplementing my income. Secondly, I saw the potential for it to evolve into a fulfilling career. But beyond my personal journey, the allure of being an advisor today lies in the fact that it has transformed into a dynamic and rewarding profession. The opportunities are boundless, and the chance to make a positive impact on others' lives is truly unmatched.

What is the most important aspect of working with clients in your opinion?

The most important aspect of working with clients is to establish trust and always listen to where they want to go in life. Although there are commonalities, each client is unique, which makes every day in this profession interesting.

<u>Personal:</u>

Please tell us about your family.

Gwen and I are celebrating 38 years of marriage. Together, we've raised three children: Jamie (Alex), Ben (Erin), and Jack (Keeley). Our family has grown to include our grandchildren, Marlo (4), Cameron (3), Poppy (1), and we are looking forward to the arrival of a new grandchild in July 2024.

What do you like to do outside of work?

Outside of work, I enjoy spending quality time with my grandchildren, playing golf, and attending Chicago Cubs games both in Chicago and Arizona.

What is a surprising fact about you people may not know?
I was a head college baseball coach at age 24!

<u>Relationships:</u>

Describe your association with Strellner Financial Group.
I returned to the Cedar Rapids area in 1997, leaving Rochester, MN, to take on the role of local general agent for Life Investors/Transamerica. Over time, our outstanding organization has evolved into the remarkable Strellner Financial Group. One of the most rewarding aspects of my career has been contributing to the success of many individuals.

What value has Collective Financial Group provided you?
CFG was instrumental in our transformation into a fully independent financial planning firm 8 years ago. To have the size/scale of CFG is critical today and serving as a managing partner of CFG has been an excellent capstone to my professional journey.

Why are relationships so important in this business?
Relationships and people are, and always have been, the most cornerstone of our organization. These relationships not only shape our culture but also contribute to the fun and successful environment at SFG/CFG.

<u>Thoughts or Advice:</u>

Explain what it takes to be a successful advisor.
To achieve success as an advisor today, the first key step is to align yourself with the right team. Recognize that this journey is a marathon, not a sprint. Uphold your integrity, consistently doing what's right for your clients. In return, your clients will reciprocate by taking care of you.

As a leader in this industry, what is your #1 tip for those up and coming?
As a leader in this industry, my top tip for newcomers is to seek out a mentor and model the successful habits they exhibit. Focus on honing your skills in the area of the business that resonate with you and collaborate with others to complement your strengths.

<u>Comments from Leadership:</u>

"Tim's leadership, commitment to people and hard work helped get SFG and CFG to where both organizations are today. The impact he has had on his clients, advisors, and other professionals in and outside of our organization is exponential. Thank you, Tim, for all you have done over the years!" ~ Tom Fox, Rusty Fieldman & Eric Kaestner, SFG Partners