

REGISTERED MUNICIPAL ADVISORS

Below is a list of registered municipal advisors who have previously worked on SRF projects. This list is not exhaustive, and SRF borrowers are not required to choose an advisor from it. However, any municipal advisor engaged must be registered with the SEC.

You can search for SEC-registered municipal advisors here: <https://www.msrb.org/Municipal-Advisors>

Company	First Name	Last Name	City	Email	Phone
Baker Tilly	Elizabeth	Bergman	St Paul, MN	elizabeth.bergman@bakertilly.com	(651)-223-3018
Baker Tilly	Doug	Green	St Paul, MN	doug.green@bakertilly.com	(651) 223-3086
DA Davidson	Paul	Donna	St Paul, MN	pdonna@dadco.com	(612) 499-3066
DA Davidson	Michael	Maloney	Des Moines	mmaloney@dadco.com	(515) 471-2723
DA Davidson	Scott	Stevenson	Des Moines	sstevenson@dadco.com	(515) 471-2721
Independent Public Advisors	Tionna	Pooler	West Des Moines	tionna@ipamuni.com	(515) 259-8193
Northland Securities	Rebecca	Greenway	West Des Moines	RGreenway@northlandsecurities.com	(515)-657-4685
Northland Securities	Jeff	Heil	West Des Moines	jheil@northlandsecurities.com	(641) 750-5720
Northland Securities	Heidi	Kuhl	West Des Moines	hkuhl@northlandsecurities.com	(515) 657-4684
Northland Securities	Chip	Schultz	West Des Moines	cschultz@northlandsecurities.com	(515) 657-4688
PFM Financial Advisors LLC	Jon	Burmeister	Des Moines	burmeisterj@pfm.com	(515) 724-5724
PFM Financial Advisors LLC	Susanne	Gerlach	Des Moines	gerlachs@pfm.com	(515) 724-5734
PFM Financial Advisors LLC	Chip	Schultz	Des Moines	schultzc@pfm.com	(515) 724-5725
PFM Financial Advisors LLC	Matthew	Stoffel	Des Moines	stoffelm@pfm.com	(515) 724-5737
Piper Sandler	Timothy	Oswald	Des Moines	timothy.oswald@psc.com	(515) 247-2358
Piper Sandler	Travis	Squires	Des Moines	travis.squires@psc.com	(515) 247-2354
Speer Financial, Inc.	Maggie	Burger	Waterloo	mburger@speerfinancial.com	(319) 291-2077
UMB	Nathan	Summers	Des Moines	nathan.summers@umb.com	(515) 368-6073