



Andrew J. Merkle

Associate Wealth Advisor



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SPECIALTIES

Financial Planning Analysis

Trade Execution

Tax Efficient Investing

PROFESSIONAL PROFILE

Andrew is an Associate Wealth Advisor at Claris, where he supports advisors with financial planning analysis, account administration and investment implementation. Prior to joining Claris, he worked with one of the nation's largest registered investment advisory firms, where he helped develop financial plans and model scenarios related to retirement, business transitions and other planning needs. He enjoys learning what matters most to clients and helping create strategies that allow them to focus more on their goals and less on their financial concerns.

EDUCATION & CERTIFICATION

- Series 65 Licensed
- M.S., Finance, University of Iowa, Iowa City, IA
- B.S., Personal Finance and Financial Planning, University of Wisconsin-Madison, WI

