



PRESS RELEASE

MERSBERGER FINANCIAL GROUP FORMS STRATEGIC PARTNERSHIP WITH PAUL JOCHIMSEN OF JOCHIMSEN WEALTH MANAGEMENT

October 18, 2022

Mersberger Financial Group, a financial advisory firm that specializes in financial planning and wealth management strategies, recently announced their partnership with Paul Jochimsen of Jochimsen Wealth Management in Sheboygan, WI.

Jochimsen Wealth Management and Mersberger Financial Group (“Mersberger”) have had a strong affiliation for the past several years. Recently, Mersberger made a significant strategic move to strengthen their firm and merged with Merit Financial Advisors (“Merit”), a national RIA with over \$6.1 billion of assets and 36 locations across the country. The collective partnership will allow Paul Jochimsen to maintain the existing affiliation with Mersberger and leverage the national scale of Merit to enhance their client service offerings.

Jochimsen Wealth Management was founded by Paul Jochimsen, who has been serving clients since 1988. As part of the transition to Merit, Paul, and his daughter Hope Jochimsen will integrate into the Mersberger team of more than 20 professionals.

Paul Jochimsen said, “I am excited to continue my financial planning partnership with Mersberger Financial Group and looking forward to beginning a strong partnership with Merit Financial Advisors. Merit’s focus on client service, technology, and strong organizational culture will allow me to continue servicing my clients at a high level while giving me access to additional resources and expertise to build strong continuity for my clients.”

“Our firm has worked with Paul for several years and we look forward to him merging with us and Merit Financial Advisors. We are excited to work with him as he blends his practice into ours and collaborates with us to continue servicing his clients,” said Joshua and Zach Mersberger, Co-Regional Directors of Mersberger Financial Group and Merit Financial Advisors.

The merger was finalized on September 30, 2022. Financial and legal terms of the deal were not disclosed.

About Mersberger Financial Group

Mersberger Financial Group is an experienced group of professionals that serves individuals, institutions, employers and advisors in a fiduciary manner to help them achieve personal and financial success. The firm recently merged with Merit Financial Advisors to support their ongoing growth and enhance their client service offering. For more information, visit www.mersbergerfinancialgroup.com.

About Merit Financial Advisors

Merit Financial Group, LLC, doing business as Merit Financial Advisors (“Merit”), is a national wealth management firm that supports both the independent broker-dealer and RIA models. Based in Atlanta, Georgia, Merit has 36 offices throughout the U.S. and managed \$6.1 billion in assets as of September 30, 2022 (\$4.47 billion in advisory, \$1.56 billion in brokerage assets and with \$92 million in assets under advisement). For more information, please visit www.meritfinancialadvisors.com.

Securities offered through LPL Financial, member FINRA/SIPC. Investment advice offered through Merit Financial Group, LLC, an SEC-registered investment adviser. Merit Financial Group, LLC, Merit, Merit Financial Advisors and Mersberger Financial Group are separate entities from LPL Financial.