



# Jacqueline (Jacie) Fogelberg MBA

## LEAD CLIENT ADVISOR

952.405.7941 (o) • 952.457.1916 (c) • jfogelberg@meristemfw.com

At the age of 19, Jacie Fogelberg was a “runner” on the floor of the Chicago Board of Trade. That exciting environment of trading and finance was the impetus that influenced Jacie’s career direction. Since then, she has accumulated over 23 years of service in wealth management, private and commercial banking sectors, public finance, working in business development and managing commercial loans. In 1997, she focused her efforts on assisting wealthy families with their investments, trusts, banking, and financial planning.

As a Client Advisor, Jacie knows she is providing the most up-to date financial information and guidance to **Meristem** clients. She loves to work on both the technical and the emotional side of financial planning. **Meristem** is a place where objective advice is offered which gives her a feeling of professional and personal satisfaction.

Jacie and her husband Brian volunteer their free time working with at-risk youth and raising their two teenagers in Edina.

### EDUCATION

**Loyola University Chicago**  
MBA, Finance and Accounting (1991)

**University of Wisconsin - Madison**  
BS, Economics and Spanish (1985)

**University of Seville - Spain**  
6 Month Study Abroad Program (1984)

### WORK EXPERIENCE

**Meristem**  
Client Advisor, 2008 - present

**US Trust Company**  
Business Development Officer, 2004 - 2008

**Wells Fargo/Marquette Capital Bank/US Bank**  
VP, Private Banking, 2001 - 2004

**US Bank, Minneapolis**  
VP, Special Assets, Private Banking, 1995 - 2001

**First National Bank of Chicago**  
VP, Public Finance, 1994 - 1995

**American National Bank & Trust Co., Chicago**  
Assistant VP, 1990 - 1994

**Northern Trust Company, Chicago**  
Operations Specialist, 1986 - 1990

### COMMUNITY INVOLVEMENT

**Social Venture Partners Minnesota**, Board of Directors

### PAST BOARD PARTICIPATION

- **Free Arts Minnesota**, Board of Directors Chairman
- **KIPP Academy**, Development Committee
- **Edina Country Club**, Social Committee

### INTEREST/HOBBIES

Spending time with family, skiing, ice skating, scuba diving



**MERISTEM**  
FAMILY WEALTH