



Boeckermann Grafstrom Mayer



DANIEL A. BOECKERMANN, CPA, PFS
Principal

CONTACT

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AREAS OF EXPERTISE

Daniel A. Boeckermann is a Principal of Boeckermann Grafstrom & Mayer, LLC and a Personal Financial Specialist. Dan has extensive experience working with family-owned and closely-held businesses. He provides a wide range of services, including auditing; income tax planning and compliance; estate tax planning; financial, business and succession planning; internal control reviews; forensic auditing; management restructuring; and other management advisory services.

Dan has a diverse range of industry experience, including restaurants, lodging and hospitality companies; contractors and construction; manufacturers, distributors and wholesalers; manufacturers' representatives; printing companies; real estate developers and partnerships; machine shops; investors and investment companies; ranching and farming; and service companies, including architects, attorneys, advertising companies, physicians, and advisory companies.

PROFESSIONAL EXPERIENCE

Co-Founder, Boeckermann Grafstrom & Mayer, LLC,
Certified Public Accountants
Bloomington, Minnesota
1982 - Present

Co-Founder and Managing Partner,
Boeckermann, Fiebiger, Swanson & West,
Certified Public Accountants
Moorhead, Minnesota and Minneapolis, Minnesota
1972 - 1982

Accountant, Graham J. Goesen, Ltd,
Certified Public Accountants
Moorhead, Minnesota
1970 - 1972

OTHER PROFESSIONAL EXPERIENCE

Co-Founder and Principal,
BGM Wealth Partners, LLC,
Bloomington, Minnesota
1996 - Present

Co-Founder and Principal,
BGM Holdings, LLC,
Bloomington, Minnesota
1999 - Present

Co-Founder and Chairman of the Board of Directors,
Cornerstone Private Asset Trust Company, LLC,
Sioux Falls, South Dakota
2002 - Present

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OTHER PROFESSIONAL EXPERIENCE

Chairman of the Audit Committee and the Funds Management Committee Served on the Executive Loan Committee,
Member of the Board of Directors, Riverside Bank
Minneapolis, Minnesota
1995 - 1999

**Member of the Board of Directors,
Member of the Executive Loan Committee, Funds
Management Committee and Audit Committee,**
Associated Bank of Minnesota,
Minneapolis, Minnesota
1999 - 2000

**Co-Founder and Chairman of the Board of Directors
Chairman of the Audit Committee and Member of the
Executive Loan Committee,**
Venture Bank,
Bloomington, Minnesota
2001 - Present

LICENSING, MEMBERSHIPS AND HONORS

- Received Certified Public Accountant (CPA) license in 1972
- Became a Personal Financial Specialist (PFS) in 1987
- One of the first twenty-five CPAs in the nation to receive the PFS designation from the American Institute of Certified Public Accountants, and received the third highest score in the nation on the 1987 PFS examination
- Passed SEC Series 65 exam in 1996 and became a Registered Investment Advisor
- Member, American Institute of Certified Public Accountants
- Member, Minnesota Society of Certified Public Accountants
- Member, American Institute of Certified Public Accountants Personal Financial Planning Division
- Member, American Institute of Certified Public Accountants Management Advisory Services Division
- Licensed as a Certified Public Accountant in Minnesota, New York, North Dakota and South Dakota

EDUCATION

- B.A. degree in Accounting, Moorhead State University, 1971