



**Daniel A. Boeckermann, CPA, PFS**  
Principal, Personal Finance Specialist

### CONTACT

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D (952) 844-2511 F (952) 844-2525 

### PRIMARY SERVICES

- Advisory Services
- Family Office Services
- Outsourced Accounting Services
- Tax Services

### PRIMARY INDUSTRIES

- Agriculture
- Auto Dealerships
- Contractors and Construction
- Franchising
- Professional Services
- Manufacturers and Distributors
- Real Estate Developers
- Transportation and Logistics

### AREAS OF EXPERTISE

**Daniel A. Boeckermann** is a Principal of Boeckermann Grafstrom & Mayer 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, CPAs  
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



**Boeckermann  
Grafstrom  
Mayer**

**Daniel A. Boeckermann, CPA, PFS**  
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**OTHER PROFESSIONAL EXPERIENCE**

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

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

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

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

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

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

**LICENSING, MEMBERSHIPS AND HONORS**

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- Licensed as a Certified Public Accountant in Minnesota, New York, North Dakota and South Dakota
- 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

**EDUCATION**

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- B.A. in Accounting, Moorhead State University, 1971
- Diploma, Melrose High School, 1967