



EQUITABLE ADVISORS



Kayla Tessmer, Financial Advisor

My name is Kayla Tessmer, and I am a financial advisor with Equitable Advisors. Prior to entering the financial industry, I spent 15 years as an English teacher, as well as utilizing my master's degree to design curriculum and to help authorize charter schools. My experience in education taught me to remain calm and collected under pressure, and I am quick to find innovative solutions for difficult situations. When I made the decision to leave the education field, I knew I needed to find a career that would still fulfill my passion for helping others; this is what steered me towards becoming a financial advisor. As a financial advisor, I help people realize their life goals. My caring and compassionate nature makes me someone who listens to my clients' concerns for the future and takes their entire situation into account when devising a plan that lays out actionable steps up a stairway to success.

Licenses:

- Series 7
- Series 66
- MN Life and Health Insurance License

Areas of focus:

- Retirement Planning
- Education Planning
- Estate Planning Strategies
- Insurance Planning
- Employee Benefits
- Executive Benefits Planning

I chose a career at Equitable because it provides me with access to a wide menu of solutions and world-class investments, with a focus on tax-advantageous strategies. This, combined with being part of a team that includes professionals with a wide bench of expertise, makes it possible for me to fulfill my duties as a fiduciary who provides holistic, clear, and personalized recommendations for each client I work with. Whether my clients seek security for their immediate family, to impact their community, or to leave behind a legacy for future generations, I have the tools and team to support those goals.

My husband, Ben, and I live in Hutchinson with our two kids, Dylan (21) and Ava (6). I love the community that my husband grew up in and look forward to opening my own brick and mortar location soon so that I can contribute to what makes Hutch such a special place. In my free time, you can find me spending time with my family at the lake, going out to a local restaurant, or planning my next family vacation.

The two pyramids

Strategy

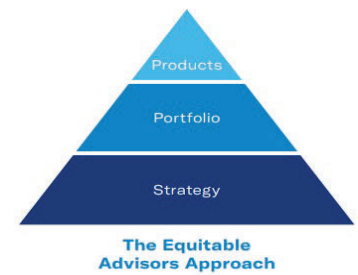
Building a comprehensive or focused strategy with qualified goals and deadlines.

Portfolio

People commonly build a portfolio by purchasing products that "seem right at the time." The proper approach is to define your goals, define the timeline for that goal, as well as the risk you are willing to take, then build the portfolio allocation to meet these objectives.

Product

Shopping and analyzing a crowded marketplace for the products that best fit the modeled portfolio. The more complex and sophisticated the challenges and strategies, the more critical professional analytical assistance become.



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