



Joe Swanson

Financial Services Representative
Principal Securities Registered Representative
Investment Adviser Representative



Ready to focus on your financial goals? I can help. Your goals — my focus. Let's put the strategies together to work for you. Whether your priority is personal finances, your business, or both, I'm committed to helping you succeed.

Let's connect to get started:

Minnesota Business Center
952-277-4259
swanson.joe@principal.com
[11100 Wayzata Blvd. Suite 405](#)
[Minnetonka, MN 55305](#)

EXPERIENCE:

Joe first started in the Financial Services business with Principal in the Summer of 2003. He has worked with over 100 employers regarding their plans, ranging from startup to \$120,000,000 in plan assets. Joe's background in small-business retirement planning and implementation helps employers manage their Deferred Compensation, 401(k), Pension and ESOP Plans, but he is now part of a dynamic team that provides high levels of service across all categories.

EDUCATION & CREDENTIALS:

Joe is currently serving as the Co-Chair of the Building Better Leaders program in Wayzata, MN. His past professional activities include the Minneapolis Chamber of Commerce Small-business Committee and the Minnesota State Colleges and Universities (MnSCU), Trustee where he served as the treasurer of MnSCU Board.

INTERESTS:

Joe resides in Plymouth, MN with his wife Zoe and their two children.

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