JoAnn Holst
ADVISERS, INC

Let's grow together

Jo-Ann HOLST, CFP®

PRESIDENT, FOUNDER

Jo-Ann Holst is a CERTIFIED FINANCIAL PLANNER™, independent Investment Adviser Representative, insurance professional and author serving individuals and their families throughout the greater Denver area and the Front Range. As president and founder of Jo-Ann Holst Advisers, Inc., her No. 1 priority is ensuring clients are equipped to live their lives to the fullest by helping them make the most of their hard-earned money.

Jo-Ann's specialties include technology-based (cyborg) planning, income planning, investment advice, balancing risk and safety, tax-efficiency planning, legacy planning and retirement asset strategizing. She has passed the Series 65 securities exam and holds life and health insurance licenses. She earned her bachelor's degree from the University at Albany, State University of New York.

Jo-Ann's interest in what moves the economy brought her to the financial industry in 1996. That interest became a passion, and today she spends much of her free time researching what's happening in the world markets and studying for what's coming next. Jo-Ann gained experience working in the securities, insurance and commodities industries, and is proud to work as a fiduciary, a legal obligation she upholds by acting in the best interest of her clients at all times. She has developed and delivered interactive seminars to groups of all ages throughout Colorado.

Jo-Ann is a Better Business Bureau A+ Member. She has received the following recognition for her services: Chairman's Club with Royal Fund Management, quoted in Investment News magazine, and appeared on "Colorado's Best" and "Colorado & Company" local television programs. She co-wrote the book "Breaking the Glass Ceiling: Influential Women in Business."

In her free time, Jo-Ann enjoys working in her greenhouse and garden. She gives most of her produce to her clients or donates the fresh food items to families in need. Jo-Ann is also an accomplished fused glass artist, with galleries in Colorado and New Mexico featuring her work. She has two daughters and one granddaughter. Her eldest daughter, Jenelle, is a doctor of intensive care medicine. Her youngest daughter, Colette, is her business partner and the future of JHA. Jo-Ann and her loving husband, Bob, reside in Littleton, Colorado, with two little dogs named Sassy and Tanner.

We are an independent financial services firm helping individuals create retirement strategies using a variety of investment and insurance products to custom suit their needs and objectives. Investment Adviser Representative of and investment advisory services offered through Royal Fund Management, LLC, an SEC Registered Adviser.

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