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Heather Favre, CPA, MBT, CFP®

Director, NorthRock Tax Services

As a Certified Public Accountant and a Certified Financial Planner® professional with over 18 years of experience in comprehensive tax and financial planning, Heather drives a synchronized partnership between tax services and Personal Office™ advisors to provide sophisticated solutions to achieve client goals.

Heather is passionate about integrating her tax expertise with clients' overall financial goals by working collaboratively with the NorthRock wealth advisory teams to provide coordinated wealth management solutions to clients and their families. She has worked with a wide range of clients from small business owners to executives and retirees, and she especially enjoys helping clients transition through different life stages.

Heather is a licensed CPA in Minnesota and holds a Bachelor of Arts and Master of Business Taxation from the University of Minnesota. She has also earned a Certified Financial Planner (CFP) designation.

Heather lives in Edina, Minnesota, with her husband, Paul, and two daughters, Evelyn and Olivia. She enjoys traveling, the outdoors and culinary arts. She is also an avid cribbage player.

PROFESSIONAL DESIGNATIONS AND ASSOCIATIONS

- ✓ Bachelor of Arts, University of Minnesota-Twin Cities
- ✓ Master of Business Taxation, University of Minnesota-Twin Cities
- ✓ Certified Public Accountant
- ✓ Certified Financial Planner (CFP®)

PROFESSIONAL AND COMMUNITY INVOLVEMENT

- ✓ Member of AICPA
- ✓ Member of Minnesota Society of CPAs

18+ YEARS IN INDUSTRY