



Sam Cari, J.D.

Director, Estate Planning and General Counsel

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Integrating over 12 years of legal counsel and financial planning experience, Sam manages client strategy and the implementation of estate planning initiatives. As General Counsel, he is responsible for leading senior management with effective advice on corporate strategic legal matters.

Sam enjoys his unique role of actively collaborating with every department across the firm. With the ability to cultivate relationships with clients and understand their complex situations, Sam drives a seamless client experience from an estate planning and counsel perspective. Sam provides advice to clients in areas such as estate tax reduction strategies, entity formation and governance, private investment opportunities and real estate transactions.

Sam graduated from the Opus School of Business at the University of St. Thomas, earning a bachelor's degree in finance. After spending time in the financial industry, Sam earned his law degree from William Mitchell College of Law in St. Paul, Minnesota. Prior to joining NorthRock Partners, Sam worked in private practice with a focus on estate planning, business law and general litigation.

Sam and his wife, Erin, live in Deephaven, Minnesota, with their four children, Nell, Sam, Mae and Bea. They enjoy spending time on Lake Minnetonka, golfing and living an active lifestyle.

PROFESSIONAL DESIGNATIONS AND ASSOCIATIONS

- ✓ Juris Doctor, William Mitchell College of Law
- ✓ Licensed attorney in Minnesota
- ✓ Bachelor's degree in Finance, Opus School of Business, University of St. Thomas

PROFESSIONAL AND COMMUNITY INVOLVEMENT

- ✓ Member of Lake Minnetonka Excelsior Rotary Club
- ✓ Member of Hennepin County Bar Association
- ✓ Member of Minnetonka Yacht Club