

WELLSKY RETIREMENT PLAN ADVISOR TEAM SPOTLIGHT

Reach out to us for questions regarding your 401(k) or any questions related to your financial wellness. Email us at WellSkyRetirementTeam@RFOnline.com and we will be in contact within 24 hours.



Kerry Berger

Financial Advisor

Kerry has learned first-hand how to cultivate relationships through careful listening and prioritizing individual needs. She enjoys working with a variety of clients and has a special knack for relating to young families. Kerry holds her Life, Accident, and Health Insurance, Property and Casualty Insurance, Series 7, Series 63, and Series 65 registrations.



Zack Eckert

Financial Advisor

Zack came to Renaissance Financial because he believes that designing a personal financial strategy to address the issues and concerns unique to each individual is critical to achieving long term stability. He especially enjoys helping people who are starting families prepare for college education. Zack holds his Series 7 and 66 registrations, and his Life, Accident and Health Insurance Agent license.



Chad Gerdes

Financial Advisor

Chad focuses on helping individuals prepare for major events, whether it be marriage, children, career changes or retirement. For businesses, He advises owners getting started, are expanding, or are preparing for retirement, as well. He holds his Life, Accident, and Health Agent license, as well as his FINRA Series 7 and Series 66 registrations.



Luke Scott, CFP®

Financial Advisor

Luke specializes in creating strategies for college, retirement, protecting your family, and other goals. His retirement knowledge is extremely beneficial to business owners and pre-retirees as well. He has earned his Life, Accident, and Health Insurance Agent license, FINRA Series 7 and 66 registrations, and the CERTIFIED FINANCIAL PLANNER™ (CFP) certification.



Matt Wells

Financial Advisor

Matt specializes in strategizing with families, particularly those with special needs children or relatives, as well as charitable giving from both the donor's and organizations' perspectives. Matt holds his FINRA Series 7 and 66 registrations as well as his Life, Accident, and Health Agent license.



Jon Ogren, C(k)P®, AIF®, CPFA®

Financial Advisor

With twenty-two years of experience in retirement plan sales and service, Jon brings deep expertise to his work. His passion for delivering excellent service inspires him to help clients achieve financial freedom in the way that suits them individually. He holds his Life, Accident, and Health Insurance Agent license, has his FINRA Series 7, 65 and 63 registrations and is an Accredited Investment Fiduciary® (AIF®) and Certified 401(k) Professional (C(k)P®).

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