



Jeff Sams, CFA

Managing Director
Financial Strategies

CONTACT

Phone: 612-851-4904

Email: jsams@northlandsecurities.com

BACKGROUND

Jeff Sams is a Managing Director and Head of the Financial Strategies Group at Northland Securities. He leads a team responsible for Bond Analytics, Municipal Bond Credit Support, Asset Liability Management Reporting, Bond Portfolio Accounting, and RIA Performance Reporting for firm clients. Jeff has over 20 years of experience in the financial services industry.

EDUCATION

Jeff has earned the Chartered Financial Analyst® (CFA®) designation passing each exam on the first attempt, has a degree in Finance from the Carlson School of Management at the University of Minnesota, and has attended the Financial Manager's School at the Graduate School of Banking in Madison, Wisconsin.

PROFESSIONAL LICENSES/REGISTRATIONS

Jeff holds and maintains the FINRA Series 7 General Securities Representative, Series 24 General Securities Principal, Series 53 Municipal Securities Principal, Series 52 Municipal Securities Representative, Series 66 Uniform Combined State Law, and Series 63 Uniform Securities State Law Exam registrations, and is a Chartered Financial Analyst® (CFA®) Charterholder.

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