MICHAEL BILLS

Owner | Portfolio Manager
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Vista Family Office
860 Blue Gentian Rd, Suite 150
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- 2016- Present: Vista Family Office
- 1999 - 2016: Morgan Stanley
- Series 7,63,65,31 Life and Health
- Retirement Planning Specialist 2009
- Senior Vice President of Wealth Mangement 2008
- Guided Portfolio Manager 2007- Current
- Morgan Stanley Dean Witter Financial Advisor Training Program Graduate 1999
- Smith Barney Presidents Council Member
- 2006,2007,2008,2010,2011
- Eastview Community Foundation
- President of Dakota REV Soccer Club
- Opportunity Partners
- Big Brothers Big Sister of Minnesota
- Summit Academy
- Minnesota Youth Soccer Association

My eighteen years of experience in the financial services industry has provided me with tremendous experiences in a wide array of markets and new paradigms. This experience has taught me the valued insight to managing risk in portfolios in order to optimize returns in uncertain times.

I was born and raised in Blaine, Minnesota and attended the University of Minnesota. I started my own business at the age of 16 in the Arabian Horse Industry and still maintain involvement today. In my younger days I was a semi-professional soccer player in California as a goalkeeper.

I began my career in the financial services industry in 1999 with Dean Witter and through 6 mergers or acquisitions I left Morgan Stanley to co-found Vista Family Office in 2016. My team and I realize the struggles investors face today. My focus as your independent financial advisor is to customize, educate and present strategies that put your goals first and effect those strategies in a way that minimizes risk and maximizes returns. At Vista Family Office our focus is to treat your family as if you are our own.

When outside of the office, my son Nik is an accomplished soccer player and my daughter Chloe loves to dance. My wife and I still are involved in Arabian Horses so you will find us traveling the country to various competitions and events.

KELENE SKRYPEK

Owner | Investment Planning Director
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Eagan, MN 55121

- 2016- Present: Vista Family Office
- 2003 - 2016: Morgan Stanley, Associate Vice President, Investment Management Consultant, Financial Advisor
- 2000 - 2003: Smith Barney, Registered Marketing Associate
- BA - Business Administration, 2001, University of St. Thomas, St. Paul, MN
- Series 7, 2001
- Series 66, 2001
- Series 31, 2011
- Insurance Representative, Life, Health, LTC, 2003
- Investment Management Specialist, Designation, 2007
- Financial Planning Specialist Designation, 2005
- Twin Cities 5 Star Wealth Manager, 2014, 2015, 2016, 2018
- Town and Country Club, St Paul, MN
- Nativity of our Lord Parish

My eighteen years in the financial services industry shaped me into an advisor who takes the time to listen, educate, and establish plans with my clients. I collaborate with clients to help achieve their goals.

After growing up in beautiful Stillwater, MN, I completed my undergraduate Bachelor of Arts degree from the University of St. Thomas in 2001.

I started my financial advising career with Salomon Smith Barney and spent fifteen years with the firm which eventually became Morgan Stanley. Wanting to continue advising families, offering a complete wealth management plan and providing independent advice, I co-founded Vista Family Office in March 2016. My role as your advisor is to work alongside you, your family, and your other professional advisors to put a plan into place to address all areas of wealth management and family support. My goal is to help make the process less intimidating and easier to understand.

Outside of the office you will find me enjoying time with my husband and three kids at local and national parks, golfing, skiing, and lots of hockey!

The Five Star Wealth Manager award, administered by Crescendo Business Services, LLC (dba Five Star Professional), is based on 10 objective criteria. Eligibility criteria – required: 1. Credentialed as a registered investment adviser or a registered investment adviser representative; 2. Actively licensed as a registered investment adviser or as a principal of a registered investment adviser firm for a minimum of 5 years; 3. Favorable regulatory and complaint history review (As defined by Five Star Professional, the wealth manager has not; A. Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine; B. Had more than a total of three settled or pending complaints filed against them and/or a total of five settled, pending, dismissed or denied complaints with any regulatory authority or Five Star Professional's consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through Five Star Professional's consumer complaint process; feedback may not be representative of any one client's experience; C. Individually contributed to a financial settlement of a customer complaint; D. Filed for personal bankruptcy within the past 11 years; E. Been terminated from a financial services firm within the past 11 years; F. Been convicted of a felony); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients. Evaluation criteria – considered: 6. One-year client retention rate; 7. Five-year client retention rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations. Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. Award does not evaluate quality of services provided to clients. Once awarded, wealth managers may purchase additional profile ad space or promotional products. The Five Star award is not indicative of the wealth manager's future performance. Wealth managers may or may not use discretion in their practice and therefore may not manage their client's assets. The inclusion of a wealth manager on the Five Star Wealth Manager list should not be construed as an endorsement of the wealth manager by Five Star Professional or this publication. Working with a Five Star Wealth Manager or any wealth manager is no guarantee as to future investment success, nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by Five Star Professional in the future. For more information on the Five Star award and the research/selection methodology, go to fivestarprofessional.com. 2622 Minneapolis-St. Paul area wealth managers were considered for the award; 591 (23 percent of candidates) were named 2018 Five Star Wealth Managers. 2017: 2304 considered, 836 winners; 2016: 4387 considered, 1690 winners; 2015: 2673 considered, 825 winners; 2014: 1931 considered, 844 winners; 2013: 2151 considered, 863 winners; 2012: 1256 considered, 624 winners.