



## NEWS RELEASE

---

FOR IMMEDIATE RELEASE

**360 Financial**

**September 19, 2022**

### **360 Financial and Fleming Investment Group Announce Merger**

*Maintaining the best possible client experience, growing together, enriching lives,  
and pursuing aspirations*

**September 19, 2022**, 360 Financial, a boutique wealth management firm, and Fleming Investment Group, a financial planning practice, announced their [merger](#) today, creating a comprehensive wealth management firm. The combined company will operate under the 360 Financial brand, servicing of over 1,000 clients and managing approximately \$529 million in client assets.

Mike Rogers continues as the founder and president of 360 Financial. Fleming Investment Group's former president, Brian Bohnsack, takes on the roles of senior vice president of 360 Financial and managing principal of the Elk River location. Amy Lemke, director of operations, manages the transition to 360 Financial for both teams with a collaborative transition plan. The headquarters for the combined company will be in Wayzata, Minnesota.

"We are excited to join forces with Fleming Investment Group. This opportunity is great for our firm to expand into the Northwest metro area, collaborate with an outstanding advisory team, and provide additional resources to our respective clients," said Mike Rogers, president of 360 Financial. "Brian has built a tremendous client-focused planning practice and together we believe we will create a win-win environment for our firm and, more importantly, our clients."

Together, 360 Financial continues to enrich lives through values-based principles for our clients, employees, and team members. By living and breathing six core values: confidence, going above and beyond, positivity, problem-solving, community impact, and integrity, and is well-regarded by our clients as we help them to pursue their aspirations.

"We chose 360 Financial for many key reasons. Most important, 360 Financial's core values closely parallel our firm," said Brian Bohnsack, senior vice president of 360 Financial. "This new partnership also brings a local team of specialists that can assist us in many areas like investment management, advanced financial planning, and client service support."

The 360 Financial clients can now choose between two convenient office locations. The additional members strengthen the 360 team bench, creating growth and opportunities, like remaining on the 2022 Inc. Magazines Best Workplaces [list](#). 360 Financial made the national list of 475 companies, is one of 35 companies in the financial industry, and the only one based in Minnesota.

### **About [360 Financial](#)**

Based in Wayzata, MN, 360 Financial's mission is to enrich lives by navigating life's impactful financial events, specializing in business owners, thriving families, and top-of-their-field professionals. Big Picture Planning, the LifeWealth process, and focusing on family, occupation, recreation, and money (FORM), place the client's goals at the center of our personalized strategy. Wealth management expertise includes financial and investment advice, planning and management, estate and tax planning, and retirement. The firm's financial advisory team has more than 200 years of experience and is led by Mike Rogers, president, and founder. For more information, visit [360financial.net](http://360financial.net).

### **About Fleming Investment Group**

Fleming Investment Group has been led by Brian Bohnsack since 2014 as an independent financial services firm that was founded in 2006. The Elk River, MN-based firm was built upon strong Christian values, focused on ensuring that clients receive the highest personal attention and professional service on investment, retirement, estate, tax, and protection planning.

Fleming Investment Group has been compensated in connection with this merger. Clients are under no obligation to remain with Brian Bohnsack in connection with the merger.

Securities offered through LPL Financial. Member FINRA/SIPC. Investment advice offered through 360 Financial, a registered investment advisor. 360 Financial and Fleming Investment Group are separate entities from LPL Financial.

**Media Contact:**

Director of Marketing and Sales

360 Financial

Trone Fossum

[tfossum@360financial.net](mailto:tfossum@360financial.net) | 360financial.net