Investment Services

Why Choose *Us?*

The Financial Services Team adheres to the principles and financial discipline Blackhawk Bank & Trust has delivered to clients for years. We provide financial advice in the best interest of our clients, to protect and build legacy while pursuing financial goals.

Cetera Financial Group (Cetera) is a leading financial advice firm. Cetera empowers the delivery of an Advice-Centric Experience® to individuals, families, and businesses across the country through independent financial advisors as well as trusted tax professionals, banks, and credit unions.

Meet the *Team:*

John Peters

Vice President - Financial Advisor

John has been with Blackhawk Bank & Trust since 2013. He is a graduate of Alleman High School, received his bachelor's degree from Augustana College and his Master of Business Administration from St. Ambrose University. He holds Series 7 and 66 securities registrations and Life & Health Insurance licenses. In 2021, he earned the Accredited Investment Fiduciary (AIF) designation. John served as president of the Milan Chamber of Commerce, is a member of the Rock Island Kiwanis Club and is involved in youth baseball in the Quad Cities.

Carrie Crossen

Vice President - Financial Advisor

Carrie has been with Blackhawk Bank & Trust since 2005. She received her bachelor's degree from Western Illinois University. She holds Series 6, 7, 63, and 66 securities registrations and Life & Health Insurance licenses. In 2016, she received the American Bankers Associations' advanced degree of Certified Trust and Financial Advisor (CTFA). Carrie is a board member and treasurer for the Rock Island Rotary Club, previous board member and finance committee member of the Quad City Animal Welfare Center, and a board member for Christian Care. She lives in rural Milan with her husband and all their pets. Her hobbies include fitness, gardening and animal rescue efforts.

Nicole David

Financial Advisor

Nicole has been with Blackhawk Bank & Trust since 2016. She received her bachelor's degree from Western Illinois University. She holds her SIE, Series 7 and 66 securities registrations and Life & Health Insurance licenses. Nicole serves as president and member of Bettendorf Kiwanis Club, enjoys volunteering with Junior Achievement of the Heartland, involved in East Moline Little League and many other great organizations. When she is not caring for her two young sons, Nicole enjoys staying active with recreational sports and time with family and friends.

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Investment Services

Investment Advisory *Services*

Offering professional financial planning and diverse investment options, our team will pair its experience and commitment to your goals.
The advisory service fee is an on going annual fee based on the value of the assets in your account (transactional fees included).
Included with your advisory account:

- A customized investment plan
- On going investment advice and monitoring of your investments in your advisory account
- MoneyGuide Pro Financial Software Plan - available upon request
- Retirement income planning
- Major purchase advice
- Personal financial advice

Brokerage *Services*

With brokerage services, you may select investments for your account. In some instances, we may recommend investments to you but the decisions for your investment strategy will be yours. Please note: Brokerage services do not provide ongoing monitoring of investments.

- Pay a transaction-based fee referred to as a "commission" or "sales charge", each time you buy or sell an investment.
- Variety of investments available including stocks, bonds, and other fixed-income investments, mutual funds, annuities, and exchange-traded funds (ETFs).

Consulting *Services*

For situations that require Financial Professional advice or review, consulting services are available (Fees vary)

- Asset Allocation/Portfolio Analysis
- Charitable Giving Solutions
- Personal Financial Planning
- Comprehensive Financial Plan with our advanced Money Guide Pro Software

"Our client-centered business model allows us to do better as the client does better, which prioritizes service above sales."

Cetera® | INVESTMENT SERVICES LLC
Member FINRA/SIPC

An Independent Registered Broker/Dealer located at:

Blackhawk BANK & TRUST

Securities and insurance products are offered through Cetera Investment Services LLC (doing insurance business in CA as CFGIS Insurance Agency), member FINRA/SIPC. Advisory services are offered through Cetera Investment Advisers LLC.
Neither firm affiliated with financial institution where investment services are offered. Advisory services may only be offered by investment adviser representatives.

Investments are: *Not FDIC/NCUSIF insured *May lose value *Not financial institution guaranteed *Not a deposit *Not insured by any federal government agency.