

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, AIF[®]

Vice President - Financial Advisor

A Quad Cities native, John graduated from Alleman High School before earning his bachelor's degree from Augustana College and a Master of Business Administration from St. Ambrose University. He started with Blackhawk Bank & Trust in 2013. Exhibiting his passion for investing, John was promoted to Director of Investment Services in 2017. He now holds Series 7 and 66 securities registrations, Life & Health Insurance licenses, and in 2021 he earned the Accredited Investment Fiduciary (AIF[®]) designation. John has also 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

Beginning her career as a Financial Advisor in 2000, Vice President & Financial Advisor Carrie Crossen joined Blackhawk Bank & Trust in 2005. With several years of industry experience, Carrie brought her expertise to help launch the Financial Services Department. An alumna of Western Illinois University, she holds Series 6, 7, 63, and 66 securities registrations, Life & Health Insurance licenses, and she received the American Bankers Association's advanced degree of Certified Trust and Financial Advisor (CTFA). Outside of the office, Carrie has served as treasurer and is an active member of the Rock Island Rotary Club, a board member and finance committee member of the Quad City Animal Welfare Center, and a previous board member for Christian Care. She lives in rural Davenport with her husband and all their pets. Her hobbies include fitness, gardening and animal rescue efforts.

Nicole David, CFP[®]

Financial Advisor

Nicole is a trusted financial advisor who has made significant contributions to Blackhawk Bank & Trust since joining in 2016. An alumna of Western Illinois University, Nicole holds her SIE, Series 7 and 66 securities registrations and Life & Health Insurance licenses. She attained the CERTIFIED FINANCIAL PLANNER[™] certification in 2023 after meeting the rigorous experience and ethical requirements of the CFP Board, including successfully completing financial planning coursework at an accredited college or university and passing the 6-hour comprehensive CFP[®] certification exam. In the community, Nicole served as president and is a member of the Bettendorf Kiwanis Club, serves as board chair for the Bettendorf YMCA advisory board, enjoys volunteering with Junior Achievement of the Heartland, and is 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. Nicole maintains offices located at our Bettendorf branch and in Milan's Parkway location.

Located at:



Parkway Branch
2009 10th Avenue E, Milan, IL 61264



Bettendorf Branch
4413 53rd Avenue, Bettendorf, IA 52722

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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
- Ongoing 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 “salescharge”, 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.”



Blackhawk
INVESTMENT & RETIREMENT
SERVICES

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.