



Daniel G. Gibson, CFP®
Principal

Dan is a Principal with SVA Plumb Wealth Management, LLC. He has provided comprehensive financial planning and investment management services for SVA Plumb Financial clients since 1998.

In his role, he consults with a broad range of clients on their investments and stays closely involved in ongoing investment research, analysis and financial plan development. He has also served on the firm's Investment Advisory Committee (IAC).

Dan works closely with physicians and executives and has spoken to several medical organizations on the importance of financial planning. He also works with business owners helping them manage retirement plans, monitor investment portfolios, and plan for retirement.

Dan has been a featured writer for ABCNews.com's Financial Makeover and the Wisconsin Medical Journal. He served on the board of the Madison Estate Council and is a past President. Dan also served as a board member and Government Relations Director for the Financial Planning Association (FPA) of Southern Wisconsin from 2000-2007.

Dan's expertise, along with his background in international relations, has enhanced his knowledge of global financial markets and their impact on today's investor.

Dan is a CERTIFIED FINANCIAL PLANNER™ and an Investment Adviser Representative.



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Areas of Expertise

- Wealth Management
- Retirement Planning
- Portfolio Management
- Education Planning

Education

Edgewood College

Bachelor of Arts- International Relations

College for Financial Planning

Community Involvement

- Middleton High School Soccer Booster Club
- United Way of Dane County Key Club Member & Former Rosenberry Society Member
- Friends of Clean Lakes: Clean Lakes Alliance
- Second Harvest Food Bank
- UW Burn Center & Kids Burn Camp
- Rush Soccer Club & Middleton United Soccer Club
- Edgewood college Soccer Booster Club