SVA | Plumb Financial
Solutions for Business and Life

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 currently serves on the board of the Madison Estate Council. 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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Principal

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

Financial Planning Association (FPA)

Madison Estate Council

SPEAKER SOURCE MEMBER