



Debbie L. Oswald
Principal

Debbie is a Principal with SVA Plumb Wealth Management, LLC.

With more than 25 years of experience in investment management, consulting, trust services, retirement plans, and financial planning, Debbie assists affluent clients with establishing wealth management strategies to achieve their financial goals. Debbie proactively coordinates tax and legal resources as appropriate to provide comprehensive planning for her clients. She has also served as a member of the firm's Investment Advisory Committee that establishes and monitors investment policies and strategies.

Debbie leads our financial services team for the medical and dental community. She works closely with physician, dental and university clients. Debbie has developed expertise in the varied opportunities and financial strategies for high income earners and keeps abreast of changes within our local healthcare market. She also works with foundations and endowments to establish investment strategies and develop investment policies.

Prior to joining SVA Plumb Wealth Management, LLC, Debbie served as a Vice President and Portfolio Manager at Firststar Investment Research and Management Company. She managed investment portfolios for individuals, foundations, and corporate clients. In addition, she spent seven years working with retirement plan services for Firststar Bank (U.S. Bank), as well as Hewitt Associates, an international investment management, employee benefit, and compensation consulting firm. She has been published in the *Wisconsin Medical Journal*, *Wisconsin Woman* and *BRAVA* magazine.

Debbie is an Investment Adviser Representative.



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Areas of Expertise

- Asset Management
- Goal-based Financial Planning
- IRA Rollover & Distribution Planning
- Charitable Giving Strategies
- Retirement Plan Consulting
- Foundations & Endowments

Education

University of Illinois
Bachelor of Science -
Business Administration

Community Involvement

Asbury United Methodist Church
Endowment Committee

Past President and Director of Madison
Junior Woman's Club

Wisconsin High School Alpine Race
Association

Middleton High School Alpine Race Team
Founder and Advisor

