



Jeanne M. Mraz, CFP®
Wealth Manager

Jeanne is a Wealth Manager for SVA Plumb Wealth Management, LLC.

She has over 20 years of experience in the financial services industry. With a background in investments, asset management, and financial planning, Jeanne helps her clients by developing and implementing investment strategies for their retirement and other financial goals.

Prior to joining SVA Plumb Wealth Management, LLC, she provided comprehensive financial analysis, asset management and retirement planning services to high net worth university professionals.

In addition, she has over 10 years of experience as a senior research analyst of corporate and high yield bonds and eight years as a securities analyst for money market securities at MEMBERS Capital Advisors, Inc. She is a member of the Financial Planning Association (FPA).

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



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Areas of Expertise

- Financial Analysis
- Asset Management
- Retirement Planning
- Investments

Education

Edgewood College

Bachelor of Science in Business- Finance Concentration

Northwestern University

Financial Planning Certificate

