SVA | Plumb Financial
Solutions for Business and Life

Michael A. Tomaw
Wealth Relationship Manager

Mike is a Wealth Relationship Manager for SVA Plumb Wealth Management, LLC. He has been providing comprehensive financial planning and asset management advice to clients for 12 years and has been in the financial services industry for more than 20 years.

In his role he consults with university professionals regarding their unique financial planning needs. He believes that good financial planning begins with a thorough investigation of the client's situation and that planning is more successful when a comprehensive analytical approach is employed. Mike believes a comprehensive plan should include a client's investment portfolio, retirement, insurance and estate objectives.

Mike works closely with university professionals and has spoken to numerous professorial groups at over 20 major universities nationwide. His topics have ranged from obstacles professors face at retirement to their unique estate planning challenges. Mike's financial expertise and background in trust make him well qualified to work with today's busy university professional.

When he is not at the office, he enjoys spending time with his teenage daughters. He is the manager for one of their athletic teams and, together with his wife Kathleen, travels around the Midwest with them to numerous events and tournaments. In his free time he enjoys hiking at Devils Lake State Park near his home in Baraboo, WI with his family.

Michael is an Investment Adviser Representative.

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Wealth Relationship Manager

Areas of Expertise

- Comprehensive Financial Planning
- Retirement Planning for University Professionals
- Trust and Estate Planning
- Investment Management

Education

ABA National Trust School at Northwestern University

University of Wisconsin-Platteville

Bachelor of Business Administration-Emphasis in Finance