



Peter C. Jelacic, CFP®
Senior Wealth Manager

Pete is a Senior Wealth Manager with SVA Plumb Wealth Management, LLC.

With over 30 years of experience in the financial industry, Pete provides personalized comprehensive financial planning and investment management that helps his clients reach their goals.

Pete works with individuals and families, providing investment consulting and comprehensive financial planning including educational, retirement and estate planning. Pete has also helped clients with their philanthropic requests.

Pete also works with company retirement plans. He counsels owners and management with plan design and by offering unbiased, objective solutions. He also meets with the employees of 401(k) plans, providing educational support so they can make decisions that will help them reach their retirement goals.

Pete is a CERTIFIED FINANCIAL PLANNER™.



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Senior Wealth Manager

Areas of Expertise

- Wealth Management
- Comprehensive Financial Planning
- Retirement Plan Consulting
- Educational Funding

Education

Marquette University

Bachelor of Business Administration

Community Involvement

Financial Planning Association (FPA)
Easter Seals Wisconsin

