



Peter C. Jelacic, CFP®
Senior Wealth Manager

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

With more than 28 years of experience in the financial industry, Pete provides comprehensive financial planning and investment management that helps his clients reach their goals by first gaining a full understanding of those goals.

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

Pete helps businesses with their retirement plans, and counseling owners and management by offering unbiased, objective solutions. He also meets with the employees of 401(k) plans, providing educational support so they can make educated decisions that will affect their retirement.

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



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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)

