



Sean Cote, AIF®

Senior Wealth Manager/ Director of Retirement Plans

Sean is a Senior Wealth Manager and Director of Retirement Plans for SVA Plumb Wealth Management, LLC.

With more than fifteen years of experience in retirement planning, investment consulting and futures trading, Sean specializes in helping businesses understand how qualified retirement plans work and what options will best meet their specific needs. In his prior role with WHA Financial Solutions, a subsidiary of the Wisconsin Hospital Association, he provided research and reports for hospital investment committees to assist them in monitoring their retirement plan investments.

Sean assists business clients with managing their current qualified retirement plans. He also creates and conducts employee introduction, enrollment and review meetings for businesses. In addition, Sean performs investment reviews for retirement plan sponsors, as well as for individual clients.

Whether working with businesses or individual clients, Sean is committed to establishing an open dialogue, giving sound financial advice, and maintaining a strong working relationship with his clients.

Sean is an Accredited Investment Fiduciary (AIF®) and an Investment Adviser Representative.



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Areas of Expertise

- Employer Sponsored Retirement Plans
- Wealth Management

Education

University of Wisconsin- Madison
Bachelor of Arts