



Teresa R. Brooks, MBA, CFP®
Wealth Manager and Trust Officer

Teresa is a Wealth Manager with SVA Plumb Wealth Management, LLC and a Trust Officer for SVA Plumb Trust Company, LLC. She works with clients to determine their financial needs and helps coordinate their investments with their plans to accomplish their personal objectives.

Teresa assists in monitoring client portfolios to ensure that the investments comply with client investment policy guidelines and our company requirements. She also participates in the firm's fixed income management strategy.

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



Teresa R. Brooks, MBA CFP®
Wealth Manager and Trust Officer

Areas of Expertise

- Trust and Investments
- Portfolio Compliance
- Fixed Income Investing

Education

**University of Wisconsin – Madison
Graduate School of Business**

Masters of Business Administration,
Executive Program

St. Olaf College

Bachelor of Arts -English

