



Thomas G. Plumb, CFA President

Thomas G. Plumb is the President/CEO of SVA Plumb Financial, LLC, and SVA Plumb Wealth Management, LLC. He is also the CEO of SVA Plumb Trust, LLC. He serves as manager for many SVA Plumb client portfolios. Tom has over 35 years of experience in the investment advisory industry, having served as a trust investment officer, lead manager and president of two mutual fund companies, and primary portfolio manager for many institutional and high net worth portfolios. He has been quoted in premier investment publications such as the Wall Street Journal and USA Today, appeared on CNBC and CNN financial television programs, He provides a unique perspective to the investment markets.

Tom works with complex client situations and melds his extensive knowledge of financial markets to meet individual client goals. He is a Research Analyst and the Chief Investment Officer for SVA Plumb Financial and holds the Chartered Financial Analyst (CFA) designation.

Tom is the principal and founder of Wisconsin Capital Management, LLC, which was founded in 1984.

He previously served on the Charles Schwab Advisory Board and Dane County United Way Foundation Board. He is currently on the Advisory Board of SVA.



Thomas G. Plumb, CFA
President

Areas of Expertise

- Portfolio Management
- Financial Advising
- Security Selection
- Mutual Fund Management

Education

University of Wisconsin - Madison
Bachelor of Business Administration

Community Involvement

Member of the Madison Investment Management Society