SVA Financial Group
Solutions for Business and Life

Brett Christensen, JD, CFP®
Wealth Manager

Brett is a Wealth Manager for SVA Wealth Management.

His client centric-approach to planning focuses on education, advocacy, and coordination of the goals individuals have for themselves and their families. This holistic approach considers investment, retirement, estate, tax, education, and insurance objectives in shaping a financial plan tailored to the needs of the client.

Brett has worked extensively on an individual basis with university professionals. This group includes Professors, Deans, and Provosts at campuses across the United States. He is experienced in the unique planning challenges and opportunities their benefit programs present. This role involves educating educators and equipping them with the knowledge necessary to make informed and educated decisions.

As a Certified Financial Planner and a member of the Wisconsin Bar Association, Brett offers customized solutions to complex issues for clients and their families. Some of his particular areas of experience include estate planning, funding and withdrawing from retirement plans and IRAs, taking full advantage of retirement benefits, and maximizing Social Security benefits.

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

Brett Christensen, JD, CFP®
Wealth Manager

Areas of Specialty

- Comprehensive Financial Planning
- Retirement Planning for University Professionals
- Trust and Estate Planning
- Investment Management

Education

University of Wisconsin-Law School
Juris Doctor

Michigan State University
Bachelor of Science

Community Involvement

REAP Food Group

SPEAKER SOURCE MEMBER

A Wealth of Service.®