



Kurt G. Krumholz, CFP®
Principal

Kurt is a Principal and shareholder of SVA Plumb Wealth Management, LLC. He provides comprehensive financial planning and asset management services for his clients.

Kurt specializes in selecting and monitoring investment managers and utilizing asset allocation techniques as a means of reducing risk within an investment portfolio.

He researches the spectrum of alternatives available and provides effective solutions to his clients' needs.

Medical Economics has named Kurt as one of the "150 Best Financial Advisers for Doctors" on three occasions. He was also named to *Mutual Funds* list of "100 Great Financial Planners" for two consecutive years.

Kurt has written financial planning articles for the *Wisconsin Medical Journal* and has been quoted extensively in numerous other magazines regarding personal finances.

Kurt's expertise along with his previous experience has been beneficial in assisting his clients. Prior to joining SVA Plumb Wealth Management, LLC, Kurt was an adviser with an international investment management, employee benefit, and compensation consulting firm. He also managed a trust office with a large Wisconsin-based bank.

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



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Areas of Expertise

- Asset Management
- Retirement Planning
- Comprehensive Financial Planning

Education

University of Wisconsin- Madison

Bachelor of Business Administration

Northwestern University

American Bankers Association National Trust School

Community Involvement

Financial Planning Association (FPA)

