



Timothy R. O'Brien, MBA, CFA
Principal

Tim is a Principal and the Director of Research for SVA Plumb Wealth Management, LLC. Tim also serves on the firm's Investment Advisory Committee.

Tim provides clients with ongoing, comprehensive wealth management strategies and financial guidance while delivering personalized service. He develops strategies to preserve assets, plan for retirement, and fund education. He also develops strategies to manage risk and coordinate investments with estate planning needs.

In his role as portfolio manager, Tim works with individual and business clients to establish their financial goals and objective. He then creates and manages portfolios to meet those goals.

Tim is a Chartered Financial Analyst (CFA) and an Investment Adviser Representative.



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Areas of Expertise

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

Education

University of Chicago

Master of Business Administration

Webster University

Master of Arts

University of Notre Dame

Bachelor of Arts

Community Involvement

President & Trustee of the Village of Maple Bluff

St. Mary's Foundation Board Member

Chartered Financial Analyst (CFA) Society of Madison Board Member

Colonel (retired) for the Wisconsin Air National Guard and United States Air Force

Former F-16 & A-10 fighter pilot

