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# Chad Thalheimer, CFP<sup>®</sup>, CPWA<sup>®</sup>

Advisor, Personal Office<sup>®</sup> & Partner

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With over 16 years of private client advisory experience, Chad is inspired each day by the opportunity to deepen client relationships from the center of their financial lives. Chad delivers comprehensive advice while helping clients navigate complex planning decisions and ensuring their values and financial priorities remain aligned. With advanced professional certifications, including the Certified Private Wealth Advisor,<sup>®</sup> Chad continues to expand his knowledge base and deliver the highest level of advice.

Chad is a graduate of the University of Richmond, where he earned his degree in business administration and finance. During this time, he spent six months studying abroad at Bocconi University-School of Economics in Milan, Italy. He proudly serves as a Board Member for Barrington Youth and Family Services, a community-based, nonprofit social service agency.

Chad lives in North Barrington, Illinois, with his wife, Betsy, and their three daughters. He enjoys playing golf, coaching youth sports and watching all Chicago sports, especially the Chicago Bulls.

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## PROFESSIONAL DESIGNATIONS AND ASSOCIATIONS

- ✓ Bachelor of Science, Business Administration (Finance), University of Richmond
- ✓ Certified Financial Planner<sup>™</sup> Professional (CFP<sup>®</sup>)
- ✓ Certified Private Wealth Advisor (CPWA<sup>®</sup>), Yale School of Management

## PROFESSIONAL AND COMMUNITY INVOLVEMENT

- ✓ Member of Investment Management Consultants Association
- ✓ Board of Directors Member for Barrington Youth and Family Services

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16+ YEARS IN INDUSTRY