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# Dylan Seubert,

## CFP<sup>®</sup>, CPWA<sup>®</sup>, CIMA<sup>®</sup>

Advisor, Personal Office<sup>®</sup>

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Integrating more than 13 years of private wealth management and investment advisory experience, Dylan supports exceptional families, business owners, and non-profit entities with a comprehensive approach to financial planning. Delivering a customized Personal Office<sup>®</sup> experience, he helps clients create more time to focus on their mission and what matters most to them.

Throughout his career, Dylan has focused on developing genuine relationships grounded in trust, empathy, and candid communication. He's inspired by the opportunity to be at the center of a client's financial lives, helping to coordinate their team of advisors and ensure advice remains in alignment with their values and goals.

Dylan is a graduate of the University of Wisconsin-Madison, where he earned his degree in Personal Finance. He proudly serves as a board member for REACH Counseling, a sexual assault service provider for children and adults that offers culturally responsive outreach, prevention education, victim advocacy, and trauma counseling to the surrounding Fox Valley community. Dylan was the past-president of the Appleton West Rotary Club, a community-based non-profit promoting service to others with integrity, empathy and goodwill.

Dylan and his wife, Kaylin, live in Greenville, WI with their three young children Harrison, Fiona, and Emelia. He enjoys early morning pick-up basketball, and spending quality time outdoors or "up north" with his family and friends.

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### PROFESSIONAL DESIGNATIONS AND ASSOCIATIONS

- ✓ Certified Financial Planner (CFP<sup>®</sup>)
- ✓ Certified Private Wealth Advisor (CPWA<sup>®</sup>)
- ✓ Certified Investment Management Analyst (CIMA<sup>®</sup>)

### PROFESSIONAL AND COMMUNITY INVOLVEMENT

- ✓ Member of Financial Planning Association (FPA<sup>®</sup>)
- ✓ Member of Investments & Wealth Institute
- ✓ Board Member – REACH Counseling