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Sean Hanson
CFP®, CRPC™, APMA™

Advisor, Personal Office®

Sean has built 15 years of experience in personal financial services since graduating Magna Cum Laude from Ball State University in 2008 with a bachelor's degree in personal finance. His core belief is that providing personal financial advice is deeply meaningful work, and he feels fulfilled by the impact that he has on the lives of his clients as they are experiencing or planning for major life transitions such as a career change, retirement, college education planning, divorce, death of a loved one, or planning for their own legacy. Sean loves being a trusted source of support when his clients need answers to tough questions.

As a Certified Financial Planner practitioner (CFP®), Sean has in depth knowledge on a broad range of planning areas including investment portfolio analysis, stock compensation (RSUs & stock options), concentrated stock position management, income tax analysis and planning strategies, retirement planning, education planning, and estate planning. Sean dedicates himself to understanding and appreciating each client's situation before using his wealth of training and experience in these areas to inform his recommendation and decision-making process.

Sean and his team have been recognized as a Forbes Best-In-State Wealth Management team (2023) which highlights the talented group of administrative and investment management specialists whose teamwork and professionalism help him provide each client with the care and attention they need.

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