Business Development

SVA Plumb Financial Spotlight on Service: University Advisory Group

If you are a professor at any stage of your career, from your postdoc work through retirement, the university advisory group at SVA Plumb Financial has specialized expertise that can help you. We implement strategies to maximize your investment opportunities, as well as plan and protect your financial future.

Hi, I'm Mike Tomaw, a wealth relationship manager with SVA Plumb Wealth Management. Let's talk about our financial resources for professors like yourself. Our experienced professionals have worked with the university community for over 30 years. We understand the particular financial challenges that impact a professor's financial health. Items such as, exclusive retirement plan providers, restricted investments that aren't available to the public, unique estate planning issues, specialized income sources like royalties and patents, and intellectual property. We use a collaborative six phase financial planning process to create a comprehensive integrated financial strategy tailored specifically to your situation. This plan is coordinated by SVA Plumb Financial and your other trusted advisors. Some of the key issues we often assist professors with include, retirement planning, estate planning, asset protection, portfolio management and charitable giving. Working with the university advisory group at SVA Plumb Financial to get your financial life in order, will provide you with peace of mind and allow you to dedicate more of your valuable time to other life activities. To begin your personal financial conversation, please contact one of our university specialists today.