



## Kevin J. Nolte, CPA, CFP®

Director of Advanced Planning

Kevin is the Director of Advanced Planning and works with clients to deliver tailored solutions that help them reach their financial and strategic goals. Kevin brings a creative and resourceful attitude, as well as years of experience in the private wealth space.

Kevin's career began at Ernst & Young (EY), where he worked in EY's Wealth and Asset Management Assurance group for four years. In this role, Kevin's clients included many Chicago-based private equity funds, hedge funds, and family offices. After leaving EY, Kevin managed a single-family office, where he built out the office and assisted the family in their business ventures. In this role, Kevin oversaw over \$500 million in assets. He gained extensive experience in many areas, such as creating optimal estate structures, valuing complex assets, and managing liquidity needs. In this role, Kevin successfully navigated many of the complex circumstances faced by ultra-high-net-worth individuals and families.

Kevin grew up in Whitefish Bay, Wisconsin, and graduated Cum Laude from Marquette University with a degree in business administration, with a double major in Accounting and Information Technology. While at Marquette, Kevin was invited to join the National Jesuit Honor Society, Alpha Sigma Nu, in recognition of his academic success and commitment to service. He also received his Master of Science in Accounting from Marquette University. He is a licensed Certified Public Accountant (CPA) in Wisconsin and Illinois and is a Certified Financial Planner (CFP®).

Kevin lives in Elmhurst with his wife and son. He enjoys traveling to Northern Wisconsin and spending time with friends and family. Kevin is an auxiliary board member of the Big Shoulders Fund and a shareholder of the Green Bay Packers.



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