CFA Society Washington, DC

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Walt is a Partner and Private Wealth Manager, working directly with clients to create and maintain a customized financial plan addressing all aspects of a healthy financial life, including investments, tax planning, risk management, retirement planning, employee benefits and estate planning.

Prior to joining Creative Planning, Walt worked for an independent wealth management firm where he was responsible for investment strategy and policy for client portfolios and was a member of the firm's Investment Policy Committee. Previously, Walt worked for a global institutional investment advisor, where he worked as part of a dedicated investment team that provided discretionary Outsourced Chief Investment Officer (OCIO) and advisory services to foundations, endowments, pensions, and ultra-high net worth families.

Walt earned a Bachelor of Science degree in Finance and Marketing from the Robert H. Smith School of Business at the University of Maryland, College Park. He is also a Chartered Financial Analyst® charterholder (CFA) as designed by the CFA Institute and a member of the CFA Society of Washington, DC and a CERTIFIED FINANCIAL PLANNERTM practitioner as designated by the Certified Financial Planner Board of Standards.

Walt lives in Great Falls, VA with his wife, Laura, and son, Wyatt. In his spare time, Walt enjoys golfing, spending time with his family and taking his energetic Vizsla (Layla) for walks.