



Goldstein Advisors
2501 Parmenter Street, Suite 100A
Middleton, WI 53562-2673

Office: 608.831.3230
Toll Free: 877.640.6894
Fax: 608.831.3235

adam.peters@goldsteinadvisors.com

Adam Peters

Director of Financial Planning / Financial Advisor
CFP®, AIFA®, APMA®

As the director of financial planning at Goldstein Advisors, Adam oversees the entire financial planning process, including data gathering, running plan projections, and creation of “what if” scenarios for clients to evaluate different lifestyle choices pre- and post-retirement.

As a financial planner who specializes in education and retirement planning, Adam works to discover the “why” behind his clients’ life goals. With that understanding, he is able to provide clarity, direction and accountability in an ever-changing world as he strives to help clients realize their objectives. He also focuses on strategies designed to achieve lifetime tax minimization and efficiency.

By listening to his client’s concerns and objectives, Adam helps define goals and develops a comprehensive plan that takes into consideration the client’s unique needs, time frames and risk tolerance. He believes in long-term, collaborative relationships with not only his clients, but also with other professionals such as attorneys and CPAs, to help clients seek financial freedom and independence.

While pursuing an engineering degree, Adam realized he wanted to work in a field where he could help others directly. As a result, he graduated from the University of Wisconsin-Madison with a Bachelor of Science in Consumer Science/Personal Finance, a CFP® board-registered program. Adam worked as an intern for Goldstein Advisors from 2004 to 2006 and has worked with the firm full time since 2011. Adam was named to Forbes’ **Next Gen Best-in-State Wealth Advisors 2019** list, and recently graduated with Master of Science degree in Financial Planning and Taxation through Golden Gate University.

Adam and his wife Kelly have two young daughters and two Labrador retrievers. In his spare time, Adam enjoys woodworking, landscape photography and astrophotography, experimenting in the kitchen, reading, guest lecturing at universities, and teaching other advisors. One of his special memories is seeing a beautiful display of the northern lights during a trip to Iceland.

AREAS OF FOCUS

Wealth Management, College Funding, Tax Planning, Insurance & Protection Analysis

CERTIFICATIONS and ASSOCIATIONS

- » Certified Financial Planner Professional (CFP®)
- » Accredited Investment Fiduciary Analyst (AIFA®)
- » Accredited Portfolio Management Advisor (APMA®)
- » Member of the Financial Planning Association
- » Member of the FPA NexGen Community



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