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## Andy Peters, CPA

Chief Financial Officer

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Andy is the chief financial officer at Goldstein Advisors and oversees the budgeting, forecasting, long-term planning, implementation, and business strategic analysis for the financial team.

Andy loves working on clients' behalf to facilitate their financial independence. "It's wonderful to make a real difference in the lives of our clients," he says. "Through holistic and proactive tax planning, we create tax plans designed to work hand-in-glove with our clients' financial plans to minimize taxes paid and maximize after-tax cash flow."

With a special aptitude for finance, accounting and taxes, Andy graduated from Wisconsin School of Business at UW-Madison with a double major in accounting and risk management and insurance. He has served in various finance and accounting leadership roles since 2010 and came to Goldstein Advisors in 2016. A continual learner, Andy follows The Economist, Thomson Reuters Checkpoint and Michael Kitces' blog for financial advisors.

When he's not at work, Andy is happiest traveling and spending time with his wife Grace and pheasant hunting with Brie, his Llewelin Setter.

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### PROFESSIONAL DESIGNATIONS and ASSOCIATIONS

- » Certified Public Accountant
  - » Member of the American Institute of Certified Public Accountants
  - » Treasurer for Glacier's Edge Council, Boy Scouts of America
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