

**Steve N. Hooyman, MBA, CFP®***Chief Financial Officer/Principal***920 739 3351****steve.hooyman@bakertilly.com**

Steve Hooyman, Principal with Baker Tilly Investment Advisors, LLC, has been providing asset management and financial services since 1986. He specializes in asset management as well as financial planning and consulting. His areas of past experience include extensive experience in stock and bond management, trust and investment management, mergers and acquisitions, and financial consulting for corporate and government clients.

Specific experience

- > Headed up the trust and investment department for one of the largest banks in Wisconsin.
- > Began an investment division for one of Wisconsin's largest accounting firms.
- > Managed investment assets in both a bank trust department setting and within a large accounting firm.
- > Provided investment assistance to individual clients, foundations, endowments, government entities, and qualified retirement plans.
- > Consulting experience with county and city government as well as corporate clients.

Industry involvement

- > Estate Planning Council of Winnebago County
- > Community Foundation – Fox Valley - Board of Directors, Executive Committee, and Chairman of the Investment Committee
- > Certified Financial Planner (CFP®)
- > FINRA Series 7 and Series 63 Securities Licenses
- > Licensed Wisconsin Real Estate Broker

Education

University of Wisconsin - Eau Claire
Bachelor of Business Administration in Finance
Masters in Business Administration

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