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Our individualized services have allowed us to be in business for over 40 years with professionals that have hundreds of years of combined experience with over 2.5 billion dollars in assets under management.

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We know you're here for a reason, select which life event you're experiencing right now.


Contemplating Retirement


Company Retirement Planning


Money to Invest


Marital Status Change


Addition to Family


Changing Health Status


Inherited Money


Transitioning a Business

I need help with financial planning and investment management.

Explore Options

I need help putting together my own retirement plan.

Browse Choices

I need help with my trust and estate plan.

Review Plans

I need help setting up a retirement plan for my business.

View Plans

SPECIALTY SERVICES

Financial Planning for Savvy Women

Up until just the last few decades, there weren't as many women earning wealth directly, sitting on boards, or owning a business. Now we have money and it's time to be smart about it.

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PROFESSIONALS

Learn more about the SVA Financial Group Professionals


ROBERT CUMMISFORD
Senior Wealth and Portfolio Manager


JAMIE DROESSLER
Wealth Manager


ANNA GAUER
Trust and Compliance Officer


DAN GIBSON
Principal

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- Accessible on any Device
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ARTICLES

Reaching Retirement: Now What?
Published on December 03, 2019
You've worked hard your whole life anticipating the day you could finally retire. Well, that day has arrived! But with it comes the realization that you'll need to carefully manage your assets to give them lasting potential.

What You Need to Know About Business Succession Planning
Published on November 21, 2019
When developing a succession plan for your business, you must make many decisions. Should you sell your business or give it away? Should you structure your plan to go into effect during your lifetime or at your death? Should you transfer your ownership interest to family members, co-owners, employees, or an outside party? The key is to pick the best plan for your circumstances and objectives, and to seek help from financial and legal advisors to carry out this plan.

Planning for Marriage: Financial Tips for Women
Published on November 13, 2019
Planning for marriage should involve more than just picking out invitations and deciding whether you should serve chicken or fish at the reception. More importantly, you'll want to take a look at how marriage will impact your financial situation. And while there are a number of issues you'll need to think about, careful planning can increase the likelihood that you'll have financial success as you enter this new chapter in your life.

EVENTS

Webinar: Nearing Retirement Financial Planning Strategies
January 15, 2020 12:00PM CST

Webinar: Mid-Career Financial Planning Strategies
January 22, 2020 12:00PM CST

NEWS

SVA Financial Group's Droessler Presents Charitable Giving Roundtable
Published on November 27, 2019

SVA Trust Company Celebrates Promotion and New Hire
Published on November 8, 2019

SVA Financial Group's Droessler Presents Charitable Giving After Tax Reform
Published on October 23, 2019