PLATINUM WEALTH SOLUTIONS, LLC

MICHAEL OLSON, CFP® AIF® AWMA® CRPS®

Michael Olson is a Financial Planner at Platinum Wealth Solutions, a financial services firm specializing in estate planning strategies, wealth accumulation, business planning, and executive benefits for both publicly and privately-held companies.

A cornerstone of financial planning is the recognition that everyone's economic and life situation is unique. I believe personalized service and strategy is essential when matching clients with the right financial solutions and services.

My commitment to professionalism and the cooperative development of unique, personal goals forms the foundation of any strong financial strategy which is part of the overall financial plan.

A financial plan must reflect the stage of life its owner is in. A plan must reflect its owner's personal or business situation, and highlight those financial solutions that best fit it. A plan must also be continually reviewed to measure its achievements against stated goals, and ensure the owner is comfortable moving forward.

Personal Data

During his free time, Mike participates in a variety of Martial Arts such as Hapkido, Okinawan, and ShorinRyu.

Education

- University of Arizona Alumni
- University of Chicago Alumni
- Northwestern University Educational Certification for CFP®

THE UNIVERSITY OF ARIZONA. THE UNIVERSITY OF CHICAGO NORTHWESTERN UNIVERSITY

Professional Licenses, Designations & Certifications

- Accredited Wealth Management Advisor® (AWMA)*
- Certified Financial Planner® (CFP)**
- Accredited Investment Fiduciary® (AIF)***
- Chartered Retirement Plans Specialist (CRPS)****
- Series 6
- Series 7
- Series 63
- Series 66
- Life, Health Insurance & Variable products

Outside Activities

- Volunteer for Children's Memorial Hospital
- Volunteer for PAD's
- Volunteer for African Missions to Ghana Africa with First Presbyterian Church
- Volunteer for Chicago Cares
- Volunteer for Chicago Food Depository

*Accredited Wealth Management Advisor (AWMA)® designees distinguish themselves by identifying opportunities not only in investment planning, but also by making comprehensive recommendations to meet a broad range of your financial goals: encompassing wealth strategies, equity-based compensation plans, tax reduction alternatives, and asset protection alternatives.

**The Certified Financial Planner (CFP)® program is one of the most respected professional designations in the industry. It gives financial professionals the knowledge and skills necessary to provide comprehensive financial services to their clients. The Certified Financial Planner Board of Standards, Inc. awards the designation to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

***The Accredited Investment Fiduciary®(AIF) designation represents a thorough knowledge of, and ability to apply fiduciary practices when working towards the best interests of their clients. AIF designees are better able to assist others in implementing proper policies and procedures.

****Chartered Retirement Plans Specialist (CRPS) designees specialize in creating, implementing, and maintaining retirement plans for businesses, covering the types and characteristics of retirement plans, including IRAs, small business retirement plans, defined contribution plans, 401(k) plans, nonprofit and government plans, plan distributions, and fiduciary issues.

"Built on a Relationship of Trust"