SVA | Financial Group
Solutions for Business and Life

Robert Cummisford, CFA®
Senior Wealth and Portfolio Manager

Rob is a Senior Wealth and Portfolio Manager with SVA Wealth Management.

He focuses on helping clients structure portfolios to meet their financial goals, conducts investment research and serves on the firm's Investment Committee.

Rob has over twenty-five years of experience in the investment advisory industry, having served as lead Portfolio Manager for several stock mutual funds and strategies, Trust Investment Officer, and an investment industry consultant. He has been quoted in a wide variety of national investment publications and has appeared on CNBC and local media programs, providing perspective on asset allocation and investment markets.

Rob is a Chartered Financial Analyst® (CFA) and a member of the CFA Institute and CFA Society of Madison.

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Areas of Specialty

- Wealth Management
- Investment Research
- Portfolio Management
- Comprehensive Financial Planning

Education

Lake Forest College

Bachelor of Business Administration – Economics

Bachelor of Business Administration – Behavioral Sciences