



David C. F. Koop

Director of Markets and Client Experience

David is the Director of Markets and Client Experience for SVA Wealth Management. He is responsible for referral channels, lead generation and the client experience.

He works with the leadership team and coordinates interactions with key stakeholders on processes related to team structure and alignment, marketing efforts, relationship management and overall strategy. Recognizing that the client experience is what can differentiate SVA, he makes sure that the end-to-end process and technology within the organization is working in harmony to ensure they are delivering a high-quality and consistent experience.

David also focuses on seeking opportunities to develop new external marketing, business development and referral channels. He synchronizes all aspects of marketing and business development execution and cultivates and maintains ongoing external partner relationships with an emphasis on overall client support.

Prior to joining SVA, David spent more than ten years at a local wealth management firm, where he served as the Chief Financial Officer and was responsible for strategic and tactical financial operation. He also provided leadership, process management and strategic input on decision-making issues affecting the entire organization.

David holds a B.S. in Business Administration and Finance from the University of New Hampshire. He is currently working on his MBA at the University of Wisconsin – Madison.

David is an Investment Adviser Representative.



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Areas of Specialty

- Client Service
- Strategic Growth
- Financial Operations

Education

University of New Hampshire
Bachelor of Science - Business

Community Involvement

- Mad Alpine Ski Hill Coach

Professional Affiliations

- The Health Project – Board Member
- 100 Men of Dane County
- Young Professionals Advisory Council for The First Tee of South Central Wisconsin – Council Member
- Financial Executives International
- Wisconsin Junior Racing