



Tim Wagner, ChFC®

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Tim, a former financial advisor, has 26 years of experience in the business. He serves as an advanced planning consultant collaborating with Financial Advisors for their high net worth clients on estate and business planning strategies to enhance, protect, and preserve income and wealth. Since unanticipated and underestimated risk factors will impact well-intended financial plans, Tim's experience with life circumstances provide the ideal companion perspective for an advisor's plan to succeed for their valued clientele. Tim strives to understand an FA's own personality, market preference and available resources to adapt his practice. Tim provides objective advice and is product and service agnostic, so he can provide appropriate planning recommendations for addressing each client's intended outcome. Tim customizes solutions to cater to a client's unique set of circumstances, always seeking soft information on the client's personal side plays an essential role in the timely and efficient development, implementation and maintenance of an effective planning strategy.

Tim has since spent sixteen years as an estate and insurance planner – initially recruited for eight years by Wells Fargo Advisors LLC as their Estate Planning Consultant and now with an additional eight years to date, in a broader role with various successful financial advisors from major institutional advisory firms. Tim has shared and channeled his planning skills through nationally-approved brokerage general agencies and currently continues his practice with the full range of product and service resources.

Tim lives in the western suburbs of Philadelphia with his wife, Katrine, and sons, Brian and Scott. Tim holds a FINRA Series 7 and 63, and his Life, Health and Long-Term Care licenses.

Education

- Shippensburg University, Shippensburg, PA
BSBA of Marketing
- American College, Bryn Mawr, PA
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