



Wealth Advisor

Practice Focus

- Wealth Management and Preservation
- Independent Investment Advice
- Retirement Income Planning
- Insurance Planning & Analysis

Certification / Education

- CERTIFIED FINANCIAL PLANNER™ practitioner (CFP®)
- B.S. in Management and Finance, Purdue University

Affiliations

- Member, Financial Planning Association
- Financial Advisor, Upper Cervical Research Foundation (UCRF)
- Past Board Member, AnotherLook

Media Resource

- Chicago Tribune
- Frequently Featured Speaker

Securities offered through Securities America, Inc., Member FINRA/SIPC, Lisa Dickholtz, CFP®, Registered Representative. Advisory services offered through Securities America Advisors, Inc., Lisa Dickholtz, Investment Advisor Representative. Dickholtz Wealth Management and Securities America are not affiliated.

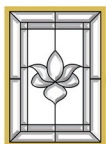
Lisa Dickholtz, CFP®

Lisa Dickholtz, a wealth advisor with Securities America Advisors and president of Dickholtz Wealth Management, has 21 years experience as a financial consultant and is licensed in both securities and insurance. Lisa specializes in working with families, family stewards, single women and widows. In addition, Lisa has in-depth knowledge on inter-generational financial planning issues as she has counseled numerous families through two or more generations.

Lisa takes her clients through a discovery process so that she can learn about their family, values, assets, advisors, processes, interests and goals. She then consults independently and collectively with a team of knowledgeable professionals from key areas of expertise in order to provide custom financial strategies designed for the life the client wants to live. Committed to making a difference in the lives of the people she works with, Lisa strives to provide extraordinary service and help clients reach the possibility of abundance in their lives.

After graduating from Purdue University with a Bachelors of Science degree in management and finance, Lisa successfully completed the demanding requirements to become a CERTIFIED FINANCIAL PLANNER™ professional through the Certified Financial Planner Board of Standards, Inc. She spent the first ten years of her career as a financial consultant with one of the major national wire houses. Then, Lisa made the decision to join Securities America, Inc. and become an independent advisor in order to provide her clients with a wider variety of resources and services better suited to achieving their goals.

Outside of the office, Lisa carves out time for exercise, golf and travel as well as being committed to lifelong learning in various continuing education and coaching programs. Lisa has served on the board of an international nonprofit foundation, is involved with local community organizations and is an active volunteer at the local public schools, primarily in the area of fund raising. Above all, Lisa particularly enjoys spending family time together with her husband, Dr. Marshall Dickholtz, Jr., and their two children, Austin and Autumn.



DICKHOLTZ WEALTH MANAGEMENT

Strategies For Life

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