

Biography – Tim Wolfe

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Personal:

As a Finance and Real Estate double major, I had quite a few career options coming out of college. It was an internship at a large RIA with deep accounting roots where I learned about the financial services Industry and made the decision to pursue it as my career. With an analytical and personable approach, I take pride in helping Individuals and families develop a deep understanding of their financial well-being and assist them in reaching their long-term goals.

Originally from Cedar Rapids, IA, I made the move to Kansas City in June of 2023. I currently reside in Midtown with my labradoodle pup named Milo. I enjoy exploring the city, traveling, staying active, seeing family and friends, as well as staying on top of my favorite sports teams.

Professional & Community Involvement:

- Wealth Management Strategist, Buttonwood Financial Group, LLC: 2023 – present
- Senior Associate, Choreo (Formerly RSM US Wealth Management): 2018 – 2023
- IT Intern, CBE Companies: 2016 – 2018
- Part-Time Student in Continuous Improvement Project Management, John Deere: 2015 – 2016

Registrations / Licenses:

- Series 65 Licensing Exam
- Financial Paraplanner Qualified Professional (FPQP®)
- Accredited Wealth Management Advisor (AWMA®)
- Bachelor of Business Administration – Finance & Real Estate, University of Northern Iowa: 2017

Mission: Buttonwood Financial Group, LLC:

At Buttonwood Financial Group, we believe that as wealth builds, life doesn't get simpler – it gets more complex. We simplify the financial process for families that would like to protect and grow their money. As Your Family CFO, we focus on the creation, implementation, and ongoing strategy in your financial life. We provide comprehensive tax, insurance, estate, investment, cash flow, retirement, education and business strategies – all integrated into your life and focused on your objectives.

