



## David E. Hultstrom

Since 2005 Mr. Hultstrom has served as president and Chief Investment Officer of Financial Architects, a registered investment advisory firm. Financial Architects provides financial planning and wealth management services for private clients.

Mr. Hultstrom is a thought leader in the wealth management industry and holds a graduate degree in business (MBA) as well as the leading financial planning and investment management designations:

- Investment Management designations:
  - Chartered Financial Analyst (CFA)
  - Certified Investment Management Analyst (CIMA<sup>®</sup>)
  - Chartered Alternative Investments Analyst (CAIA)
  
- Financial Planning designations:
  - Certified Financial Planner (CFP<sup>®</sup>)
  - Certified Private Wealth Advisor (CPWA<sup>®</sup>)
  - Chartered Financial Consultant (ChFC<sup>®</sup>)



He is currently a member of and active in:

- CFA Society Atlanta
- Financial Planning Association of Georgia (former board member)
- National Association of Personal Financial Advisors (regional board member)

In addition, Mr. Hultstrom has served on investment committees that collectively managed billions of dollars and has served as an arbitrator and expert witness in securities disputes. He has also taught over 100 CFP courses, over 200 CPA continuing professional education courses, and been a speaker at numerous financial industry events and conferences.

He has been published in several academic journals and professional magazines, and he is the author of numerous white papers on financial planning and wealth management topics. He has been a guest on several podcast/internet radio programs, and the *Your Money* show from Wharton Business Radio on Sirius XM satellite. He also produces a popular newsletter and blog for financial professionals and has been quoted in numerous newspapers and journals, including the *Chicago Tribune*, the *Christian Science Monitor*, the *Economic Times*, the *Journal of Financial Planning*, *Newsweek*, and the *Wall Street Journal*.

He was recipient of the 2015 HONORS Award for contributions to the financial planning industry from the Financial Planning Association of Georgia and the 2016 Surgent Outstanding Discussion Leader award.

Mr. Hultstrom resides in the Atlanta suburb of Woodstock, Georgia with his wife, Dawn. Dawn is a kindergarten teacher, cross country coach, and avid runner. Their daughter, Alexandra, graduated Phi Beta Kappa and *Summa Cum Laude* from Furman University and is currently earning a DPT at Duke Medical School.