



Robert L. Riedl, CPA, CFP®, AWMA®
Director of Wealth Management

Rob directs the Family Wealth Management services of the Firm. He is the first point of contact for our prospective clients who meet with him and discuss their specific personal, family dynamic and wealth management needs. Our clients value his experience as an entrepreneur due to their similar life experiences and in-depth education, and diverse knowledge of 401K, retirement, tax, estate, and other financial planning issues. Rob assumes the role of the client family's Chief Financial Officer and coordinates with the client's current professionals (i.e., attorney, tax accountant, stock broker, insurance agent) to provide a holistic and integrated wealth management plan.

Rob's past 25 years of professional experience is key when consulting with client families, businesses, and institutions. He began his career at Arthur Andersen & Co. as a staff accountant, serving the needs of their small business clients. He was founder and President of Fox Valley Spring Company and President of Oak-Bay Corporation. He also held a consultant role in which he assisted entrepreneurs in corporate management team structure, customer base, product mix and systems, in order to increase profitably and market value.

Rob received his Bachelor's Degree from Marquette University with a double major in Accounting and Finance. He received his CPA designation from the State of Wisconsin in 1983, became a Certified Financial Planner (CFP®) in 1984, and received his Accredited Wealth Management Advisor (AWMA®) designation from the College for Financial Planning in November, 2005.

Rob contributes to the development of Appleton youth and the community by coaching an Appleton Soccer Club team, which he has been doing for over 10 years. His strong analytical abilities assist him in guiding his teams to excellent seasons.

Rob and his wife Debbie have been married for 17 years and have 3 children. They spend many evenings and weekends attending their children's football, ice hockey and soccer games.