



AJW FINANCIAL[®]
STRENGTH | INDEPENDENCE | FREEDOM

CHAD D. OLSON, CFP[®], CDFA[®]
CURRICULUM VITAE

POSITIONS

- Financial Advisor, AJW Financial Inc., (2008 to Present)
- Partner, AJW Financial Inc., (2014 to Present)
- Co-Owner, xBrezzo, LLC (July, 2023 to present)
- Financial Advisor, Ameriprise Financial, (2006-2007)

PROFESSIONAL EXPERIENCE

- Preparation of customized financial plans, including cash flow, tax projections, estate planning, retirement estimates, and education funding.
- Development of customized asset allocation strategies.
- Integration of life, disability, medical, and long-term care insurance into client's risk management program.
- Collaboration with client's attorneys, accountants, mental health professionals, realtors and mortgage brokers.
- Coaching clients in their goal setting and life-planning decisions.
- Guidance for married couples towards compromise in financial decisions.
- Education of clients in all aspects of their finances to promote informed decisions.
- Research of securities and advanced financial planning topics.
- Financial projections and forecasts to illustrate divorce settlement proposals.
- Analysis of tax and cash flow scenarios due to effects of income, spousal maintenance, and child support.
- Neutral guidance for married couples working through collaborative divorce and mediation.
- Non-neutral guidance for individual's going through divorce.

EDUCATION

- Bachelor of Science—Marketing and Business Administration, Minnesota State University - Moorhead, 2005
- Certified Financial Planners Program, College of Financial Planning, 2013
- Certified Divorce Financial Analyst Program, The Institute for Divorce Financial Analysts, 2008

PROFESSIONAL CREDENTIALS AND MEMBERSHIPS

- CERTIFIED FINANCIAL PLANNER™ professional, 2013
- Certified Divorce Financial Analyst[®], 2008
- Family Mediation Training, 2017
- Series 7, General Securities Representative, 2007
- Series 66, Uniform Securities Agent State Law Registration, 2007
- Member, The Institute for Divorce Financial Analysts™
- Member, Collaborative Law Institute of Minnesota

RECENT PRESENTATIONS & TRAININGS

- Speaker, *THRIVE After Divorce*, Daisy Camp, Minneapolis, MN, 2024 - present
- Speaker/Panelist, *The Future in Minnesota: Innovative Collaborative Ideas from Each Professional Window*, CLI Annual Forum 2022
- Speaker/Panelist, *Unbundling, What Is It and How Do You Do It?*, CLI Annual Forum 2018
- Speaker/Trainer, *Role of the Financial Neutral*, 2017
- Speaker/Trainer, *Up Your Financial Game Plan*, Full Day Training Camp, 2016 to present
- Speaker, *Dollars & Sense*, Daisy Camp, Minneapolis, MN, 2014 to present
- 2015 CLI MN Annual Forum
- Speaker/Trainer, *Collaborative Experience*, Collaborative Law Institute of MN, 2011 to 2023

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