Walter Wilson, CFP®

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Walter is a Financial Advisor with Waddell & Reed and a CERTIFIED FINANCIAL PLANNER™ practitioner. He received his bachelor's degree in Mathematics and Statistics from Miami University in 2001 and began his career with Waddell & Reed in 2002. Since then, he has held various positions with the company, including: Financial Advisor, District Supervisor, and District Manager.

Walter received the Chartered Mutual Fund Counselor designation in June 2004 and the Accredited Wealth Management Advisor designation in February 2008, both from the College of Financial Planning. He received his CFP® certification in 2012.

Walter served as President of the Financial Planning Association of Southwestern Ohio for the year 2014 and served as The Chairman in 2015. He will serve as the Public Relations Director for 2016.

A lifetime resident of the Cincinnati area, Walter currently lives in Ross Township with his wife, Erin, and children, Olivia and Elliot.

Waddell & Reed is not affiliated with the Financial Planning Association or the Cincinnati Estate Planning Council.