



**Richard J. Kollauf, CPA, CFP®,
AEP®, JD**
Principal

Areas of Expertise

- Business Succession
- Mergers & Acquisition
- Estate Planning
- Trust Administration

Industries

- Family-Owned Businesses
- Professional Services

Credentials

- Certified Public Accountant (CPA)
- CERTIFIED FINANCIAL PLANNER™
- Accredited Estate Planner (AEP®)
- Juris Doctorate (JD)

Education

- Marquette University
- Bachelor of Science - Accounting
 - Juris Doctorate

Richard J. Kollauf, CPA, CFP®, AEP®, JD *Principal*

Richard is a Principal for SVA Certified Public Accountants and has experience working in accounting, financial, banking, and legal operations. Rick also has experience working as general counsel and CFO for multi-state distribution, logistics, and real estate operations.

Richard's expertise in the multi-faceted financial environment includes business succession and estate planning, tax, investments, finance, mergers and acquisitions, and trust administration. Richard provides trusted advisor tax consulting services to closely-held and family-owned businesses, as well as high net worth individuals. He works closely with the other advisors of clients.

Richard is a member of the American Institute of Certified Public Accountants (AICPA), Wisconsin Institute of Certified Public Accountants (WICPA), the Milwaukee Estate Planning Forum, and the Wisconsin Bar Association. He is also the board treasurer for the Sharon Lynne Wilson-Center for the Arts.