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## Don Goetcheus, CFP®

Consulting Group

Second Vice President - Wealth Management  
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### Welcome



I seek to understand my clients broadly and deeply enough to find the opportunities that add value not only to their financial objectives, but also to their life aspirations. I determine what's really important and develop actionable, flexible strategies to help them meet their financial needs. I also design socially responsible investing portfolios for those who want to truly align their values with their investments, while also helping to deliver the financial returns that they desire.

Ask me about Women & Co.®, a program offered by Citi to help women address the unique financial challenges they may face in their lifetimes. Visit [www.womenandco.com](http://www.womenandco.com).

#### Education and Licensing

- Bachelor of Arts - Financial Administration, 1989  
Michigan State University  
East Lansing, MI
- Guided Portfolio Manager  
Smith Barney
- Financial Planning Specialist Designation  
Smith Barney
- CERTIFIED FINANCIAL PLANNER™
- Series 7 - General Securities License
- Series 63 - Uniform State Exam
- Series 65 - Investment Advisory Agent
- Life, Health & Variable Annuity Insurance Licensed

#### Business Experience

- **2004 - Present: Morgan Stanley Smith Barney\***  
Second Vice President - Wealth Management  
Investment Management Specialist /  
Financial Advisor  
Financial Planning Specialist  
Grand Rapids, MI
- **2002 - 2004: Fifth Third Investment Advisor**  
Senior Financial Advisor  
Grand Rapids, MI
- **1996 - 2002: Wachovia Securities, Inc.**  
Financial Advisor  
Grand Rapids, MI
- **1994-1996 FMB Investments**  
Investment Consultant  
Holland, MI
- **1993-1994: Royal Securities**  
Investment Advisor  
Grandville, MI
- **1989 - 1992: Chicago Trading Floor**  
Board of Trade  
Chicago Mercantile Exchange  
Chicago Board of Options  
Chicago, IL

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