Seth L. Kaplan, CFP®, CDFA™, CFFA
Private Wealth Management

Seth L. Kaplan, CFP®, CDFA™, CFFA
Senior Vice President
skaplan@rwbaird.com

Robert W. Baird & Co.
300 University Ave., Suite 200
Sacramento, CA 95825
Direct: (916) 563-2010
Toll Free: (888) 792-7451
Fax: (916) 563-2050

www.sethkaplanfinancialadvisor.com

Industry Experience

- 14 years of experience as a Financial Advisor
- CERTIFIED FINANCIAL PLANNER™ practitioner
- Certified Divorce Financial Analyst™
- Certified Forensic Financial Analyst

Professional Affiliations

- Financial Planning Association (FPA)
- California CPA (CalCPA) Family Law Division
- National Association of Certified Valuation Analysts (NACVA)
- Institute for Divorce Financial Analysts (IDFA)
- Association of Divorce Financial Planners
- Sac County Bar Family Law
- Sacramento Collaborative Practice Group (SCPG)
- International Academy of Collaborative Professionals (IACP)

Professional Recognitions

- 2010 FIVE STAR Wealth Manager recognition

Services I Provide

- **Personal Financial Advisory Services:** budgeting and cash management, risk management, retirement planning, investment strategy, education funding, tax planning, estate planning, charitable gifting, etc.

- **Certified Divorce Financial Analyst Services:** Assist you (and your attorney/mediator) with divorce related financial services such as lifestyle and projected needs analysis, property division analysis, financial tracing, etc.

Types of Clients I Work With

- Individuals, families and businesses with investible assets of $500K or greater
- Individuals and families who benefit from comprehensive financial advisory services (integrating asset management, tax planning, estate planning, etc.)

About Baird

Baird is an employee-owned wealth management, capital markets, asset management and private equity firm with offices and operating affiliates in the United States, Europe and Asia. Founded in 1919, Baird has approximately 2,600 associates serving the needs of individuals, corporate, institutional and municipal clients.

Baird oversees and manages client assets of nearly $84 Billion. Committed to being a great place to work, Baird has been recognized as one of the FORTUNE "100 Best Companies to Work For" since 2004.