

PROFESSIONAL PROFILE



Chad W. Schiel

Fiduciary Financial Advisor

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Mission Statement

Offer tailored personalized financial solutions for individual investors and business owners by utilizing goal oriented planning, a diversified and conservative investment strategy, and uncompromising service.

Experience

Chad is a dedicated Comprehensive Wealth Manager and enjoys providing individualized attention to each client. Prior to becoming an advisor in 2009, he served five honorable years as a Marine Intelligence Analyst stationed at Camp Pendleton and completed one combat tour of duty to Iraq in 2003. A lung cancer survivor, he brings with him a warmhearted understanding in addition to his confident approach in service to his clients.

Education

- MBA: Finance and Accounting, Regis University
- Bachelors: Finance, Regis University
- Financial Planning Certification: Boston University

Honors & Awards

- California Unsung Heroes Award, California Senate
- 9x Five Star Wealth Managers Award, 2016 through 2024

Community Involvement

Chad is an avid fly fisherman and enjoys volunteering with Kids Around the World, and other youth organizations where he can share his passion for the outdoors with others. He is also a member of the Exchange Club of San Clemente and the Marine Corps League, two of Orange County's finest philanthropic community non-profits. In 2017 he was awarded the "California Unsung Heroes Award" from the California Senate for his volunteer work with military families, Veterans, and combating homelessness and hunger.

Family

Chad grew up in Yuma, a small farming community in Northeastern Colorado. His father was a practicing financial advisor for over 25 years. He has two brothers, one a financial advisor, and the other served with Chad in the U.S. Marine Corps during the War on Terrorism. Chad is married to Lauren, a dedicated 8th grade math teacher and together they have three beautiful children.

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