



Michael C. Walther II CPA/PFS, CFP[®], CFA[®]

Mike Walther founded Oak Wealth Advisors LLC in December 2008. Mike's passion for helping people led him to open the firm so that families seeking experienced and objective financial advice could access the same quality of service that has traditionally been available only to the very wealthy. Mike's mission is to help people achieve financial success and experience more joy in their lives.

Prior to opening Oak Wealth Advisors, Mike held senior positions with two of the most respected financial advisory firms in Chicago. It was through these firms, where he served on the investment committees and was involved in their strategic planning, that he developed the Oak Wealth Advisors model for client service.

Mike's career began in the Personal Financial Planning group at Arthur Andersen. In addition to advising business executives, entrepreneurs, and wealthy families at Arthur Andersen, Mike was also involved in the development of the firm's investment advisory practice. While developing this practice and providing comprehensive financial planning, Mike gained broad exposure to the various financial challenges faced by families.

He has written numerous articles for the *Chicago Sun-Times*, and has been quoted in *The Wall Street Journal*, *Business Week*, and numerous other national publications.

He has a long history of serving on not-for-profit boards and his current charitable involvement includes serving as past-president and trustee of the Northern Suburban Special Recreation Foundation and the co-chair of the financial management committee of the Winnetka Congregational Church.

In 2008, Mike was recognized by *Institutional Investor News* as one of the 20 Rising Stars of Wealth Management.

He received his BS degree in Economics and MBA with a concentration in Accounting from Vanderbilt University. He received his CPA certification from the University of Illinois Board of Trustees, Personal Financial Specialist designation from the AICPA, CERTIFIED FINANCIAL PLANNER certification from the CFP[®] Board, and CFA[®] designation from the AIMR Board of Governors. Mike is a member of the AICPA, the Financial Planning Association, and the CFA Institute.

Mike's charitable affiliations, in addition to those mentioned above, include membership in the Association of Retarded Citizens (ARC), Autism Society of Illinois, Learning Disabilities Association of America (LDA), National Association for Down Syndrome (NADS), and National Alliance on Mental Illness (NAMI).