



# MATT WUENSCHEL


*Associate Advisor*


## ABOUT

Matt has over 20 years of experience in the financial services industry serving a wide range of clients to help them achieve their unique goals. He graduated from Alfred University with a Bachelor of Science in Business Administration awarded on May 1996. He started in manufacturing and then went onto advertising until 2001 when he began working in financial services for an investment management firm that offered mutual funds and institutional strategies in a variety of asset classes. He held several accounting and analyst positions there before leaving in December 2007 to pursue an opportunity with an investment consulting firm where he serviced many types of clients with a concentration in foundations, endowments and high-net-worth individuals. He held several progressively demanding analyst roles there until November 2021 when he joined our team as an Associate Advisor.


Outside of work, he enjoys spending time with his girlfriend outdoors taking advantage of the local hills, gorges, rivers and lakes, or traveling to see friends, concerts, festivals and new places. He also appreciates his home time with their three dogs and cat.

## CONTACT

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## CONCENTRATIONS

Investments  
Retirement Planning  
Income Tax Planning and  
Preparing  
Insurance Planning  
Estate Planning

## EDUCATION

Alfred University, B.S.  
Business Administration



John G. Ullman  
& Associates, Inc.  
COMPREHENSIVE WEALTH MANAGEMENT SINCE 1978