



Timothy Hole

CFP®

SENIOR FINANCIAL ADVISOR

Experience

As a registered investment advisor, Mr. Hole provides holistic wealth management advice to help families and individuals tailor solutions to accomplish their financial objectives. In his role in The MFA Companies'® Wealth Management Practice, Tim takes great care to understand his customers' personal values and financial goals, educate them on available options, and implement strategies to support their financial well-being. He leverages over seven years of experience to provide his customers with a wide range of wealth management services including comprehensive financial planning and analysis; after-tax cash flow planning; goals-based planning; and financial forecasting.

Prior to joining MFA, Tim gained valuable insight and experience serving as a financial advisor in Morgan Stanley's wealth management division.

Expertise

- Comprehensive financial planning
- Portfolio analysis
- Retirement income planning
- Estate planning
- Budgeting and cash flow analysis
- Personal and financial reporting
- Charitable planning

Education

- BS – Business Administration; University of Rhode Island

Certifications

- FINRA Series 7 – General Securities Representative
- FINRA Series 65 – Investment Advisor Representative
- CFP® – Certified Financial Planner