MICHAEL L. THOMPSON, CHARTERED ADVISOR IN PHILANTHROPY (CAP®), ACCREDITED INVESTMENT FIDUCIARY (AIF®), ACCREDITED ESTATE PLANNER (AEP®)

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Michael is our senior wealth advisor with more than 20 years of experience helping clients achieve their financial goals. With deep wealth management experience, he takes his time to get to know our client's unique circumstances and most important values, goals, and priorities. He serves as the steward and director of our planning process, driving strategy, bringing together expertise, and delivering on our promise of true, comprehensive planning and wealth management. Michael's particular areas of expertise are around evidence-based and sustainable investing, retiree transitions, and complex estate and philanthropic planning. Michael is also an entrepreneur, experiencing success when he founded an organic food distribution company while attending the University of Florida. He remains passionate about small business and sustainable food systems and served for many years on the board of directors of Burlington's Intervale Center. Michael and his wife live on a farm in Jericho, Vermont.

Michael holds the AIF® (Accredited Investment Fiduciary®) designation, AEP®(Accredited Estate Planner) and is a Chartered Advisor in Philanthropy (CAP®). During his years as an investment professional he earned a number of securities licenses including the FINRA Series 7 (General Securities Representative), Series 24 (Registered Securities Principal), Series 51 (Municipal Securities Limited Principal), Series 63 (Uniform Securities Agent State Law), and Series 66 (Uniform Combined State Law).