

**Johnne D. Syverson, CFP®, AEP, CAP®**

Johnne Syverson has more than 30 years experience in financial services and planning. He is a Certified Financial Planner™ (CFP®) Practitioner and one of only 1,300 practitioners in the United States who is credentialed as an Accredited Estate Planner (AEP). Johnne serves as a resource to other professionals in the area of charitable tax planning, a strategy that enables individuals to increase their income, reduce taxes, and preserve their estate for their heirs and the charities of their choice. He was one of the first practitioners in the nation to be awarded the Chartered Advisor in Philanthropy® (CAP®) designation. He is a Senior Wealth Coach with Syverson Strege & Company, an independent, fee-only wealth coaching firm specializing in values-based planning for high net worth families. This strategy incorporates philanthropic values into the traditional planning process.



**JOHNNE SYVERSON**

Johnne is a past president of the Polk County Estate Planning Council, past president of the central Iowa chapter of Financial Planning Association (FPA), past president of the Mid-Iowa Planned Giving Council, and currently serves as president of the International

Association of Advisors in Philanthropy (IAAP). He is a member of the National Association of Personal Financial Advisors (NAPFA) made up exclusively of fee-only planners. Johnne holds a Master of Science degree in Financial Services (MSFS) from the American College in Bryn Mawr, PA. He and his wife, Linda, live in West Des Moines, Iowa, and have three adult children and eight grandchildren.

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