

# WIN WALSTAD

Partner



Win Walstad serves as a Partner at BT Wealth Management. Win has more than 20 years experience in investment research and analysis, portfolio management, and providing individuals personal financial advice in the areas of estate and wealth transfer planning, tax and financial planning, risk management and cash flow management.

Prior to joining BT Wealth Management, Win was a Financial Advisor with Northwestern Mutual in Atlanta. Previously, Win spent 11 years in Santa Barbara, CA at Cross Country Lending and Walstad Investment Counsel. Win has also worked as a Research Associate at Robinson Humphrey Co., Inc. in Atlanta.

Win is a Chartered Financial Analyst (CFA). He has a Bachelor of Business in Business Administration (BBA) from the University of Georgia and holds an MBA from the Goizueta Business School at Emory University. He is a member of the CFA Institute, CFA Society of Atlanta and attends the Sandy Springs United Methodist Church. Win and his wife Stephanie have four daughters and he is an avid outdoorsman when their schedules permit.



## CONTACT

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## PRACTICE AREAS

Wealth Management



## INDUSTRY EXPERIENCE

Cash Flow Management

Estate & Trust Planning

High-Net-Worth Individuals

Investment Research & Analysis

Risk Management



## EDUCATION

Master of Business Administration, Emory University

Bachelor of Business Administration (Finance), University of Georgia



## PROFESSIONAL AFFILIATIONS

CFA Society



## COMMUNITY INVOLVEMENT

Sandy Springs United Methodist