

PROFESSIONAL PROFILE



Chad W. Schiel
Financial Advisor

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Mission Statement

Offer tailored personalized financial solutions for individual investors and business owners by utilizing goal oriented planning, a diversified and conservative investment strategy, and uncompromising service.

Experience

Chad is a dedicated Comprehensive Wealth Manager and enjoys providing individualized attention to each client. Prior to becoming an advisor in 2009, he served five honorable years as a Marine Intelligence Analyst stationed at Camp Pendleton and completed one combat tour of duty to Iraq in 2003. A lung cancer survivor, he brings with him a warmhearted understanding in addition to his confident approach in service to his clients. His personal approach to working with investors has earned him the prestigious Five Star Wealth Managers Award five consecutive years.

Education

- MBA: Finance and Accounting, Regis University
- Bachelors: Finance, Regis University
- Financial Planning Certification: Boston University

Honors & Awards

- California Unsung Heroes Award, California Senate
- Five Star Wealth Managers Award - 2016, '17, '18, '19 and 2020

Community Involvement

Chad is an avid fly fisherman and enjoys volunteering with Community Outreach Alliance, and other youth organizations where he can share his passion for the outdoors with others. He is also an active member of the Exchange Club of San Clemente and the Marine Corps League, two of Orange County's finest philanthropic community non-profits. In 2017 he was awarded the "California Unsung Heroes Award" from the California Senate for his volunteer work with military families, Veterans, and combating homelessness and hunger.

Family

Chad grew up in Yuma, a small farming community in Northeastern Colorado. His father has been a practicing financial advisor for over 25 years. He has two brothers, one a PGA golf pro and the other served with Chad in the U.S. Marine Corps during the War on Terrorism. Chad had two beautiful children, Madeleine and Benjamin who like their daddy love being outside.