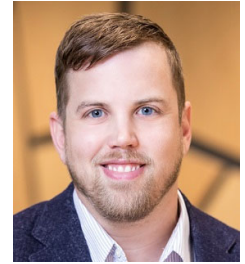




# Peter J. Holupchinski, CPA, CFA, CFP®

## CLA Wealth Advisors, LLC



Senior Wealth Advisor, Institutional Investment Services  
Minneapolis, Minnesota

612-397-3243  
peter.holupchinski@CLAconnect.com

### Profile

Peter leads the Institutional Wealth practice at CLA, having joined the firm in 2013. Peter specializes in financial planning and investment advisory services and is a Certified Public Accountant in the state of Minnesota, holds the Chartered Financial Analyst® designation, and is a Certified Financial Planner®.

### Technical experience

- 12 years industry experience including:
  - Strategic planning and modeling
  - Investment management
  - Board of directors' education facilitation

### Education and professional involvement

- Bachelor of Arts in Accounting from Saint John's University in Collegeville, MN
- Member of the CFA Institute and American Institute of Certified Public Accountants (AICPA)
- Member of the Financial Planning Association, Minnesota Chapter

### Civic organizations

- Prepare + Prosper, Volunteer Tax Preparer
- Junior Achievement, Volunteer

[CLAconnect.com](https://www.CLAconnect.com)

WEALTH ADVISORY | OUTSOURCING | AUDIT, TAX, AND CONSULTING

Investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor.

