



## PETER F. TEDSTROM CFP® & Partner

\* DBJ Top 25 Investment Manager and Financial Planners award based on assets under management. Denver Magazine award issued by NABCAP and based on an evaluation of twenty different practice categories such as experience, credentials, assets under management, fee structure and philosophy among other factors. Five Star Wealth Managers 2012 & 2015 award based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. DBJ – Top 20 Colorado Wealth Advisor award based on credentials, experience, revenue, total assets community involvement and compliance record among other factors. Worth magazine award based on nomination, credentials, client retention rate, service and communications approach among other factors. Barron's award based on assets managed, revenue and quality of practice. DBJ 40 under 40 award based on notable accomplishment in the community. Best of Colorado Wealth Managers & Financial Planners as reported by the Biz Magazine Readers Choice 2015 polling results.

Financial Planning offered through Brown & Tedstrom Estate Planning, Inc., a Registered Investment Advisor.

## OVERVIEW

Peter F. Tedstrom is a Partner of this financial planning-based wealth management firm that offers independent investment management advice and financial services in a family office environment. Since 1988, the firm has provided individuals and families, business owners, executives and entrepreneurs throughout the United States with customized Wealth Plans tailored to help pursue their unique and specific goals. Mr. Tedstrom is a 32-year veteran of the field.

## AWARDS & RECOGNITION \*

- Denver Business Journal – Top 25 Investment Managers and Financial Planners (2011, 2014, 2015)
- Nominated by Community Health Charities for the 2014 Community Health Hero of the Year Award
- DENVER magazine – Premier Colorado Advisor, Recognized for Financial Planning excellence (2010)
- 5280 magazine and ColoradoBiz magazine – Five Star Wealth Manager (2012, 2013, 2015)
- Best of Colorado Biz Magazine – Wealth Managers & Financial Planners (2015)
- Denver Business Journal – Top 20 Colorado Wealth Advisor (2008)
- Worth magazine – Top 250 Wealth Advisor (2001, 2002, 2008)
- Barron's magazine – Top 100 Independent Financial Advisor (2007)
- Denver Business Journal – Forty Under 40 (1998)

## MEDIA

- Co-author, Getting to the Heart of the Matter: A Revolution in Estate Planning for Wealthy Families
- Columnist, Denver Business Journal
- Frequent Commentator, Resource and Speaker for:
  - CBS 4
  - Fox News
  - 9News
  - Business for Breakfast Radio
  - The Wall Street Journal
  - Denver Business Journal
  - The Denver Post
  - Colorado Bar Association
  - Regis University

## CREDENTIALS

- CERTIFIED FINANCIAL PLANNER™ designation, 1987
- Firm is a Registered Investment Advisor
- Series 7 registration, held with LPL Financial
- Series 63 registration, held with LPL Financial
- Series 24 registration, held with LPL Financial

## AFFILIATIONS & ORGANIZATIONS

- Rachel's Challenge – Board Member
- Bonfils Blood Center Foundation – Board Member, Chairman
- Denver Rotary Club 31 – Member, Board of Trustees
- Denver Rotary Club 31 – Member, Finance Committee Chair
- Denver Rotary Club 31 – Member, Grants Committee Chair
- Financial Planning Association (FPA) – Member
- Junior Achievement – Teacher/Mentor Program
- Denver Advisory Board – Member
- Ernst & Young Entrepreneur of the Year – Nominee (1999)
- Family Resource Center Association – Board Member (2005–2009)

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Securities and Advisory Services offered through LPL Financial, a Registered Investment Advisor. Member FINRA/SIPC. Mark R. Brown offers financial planning through Brown & Tedstrom Retirement Planning, Inc., a Registered Investment Advisor. Peter F. Tedstrom offers financial planning through Brown & Tedstrom Estate Planning, Inc., a Registered Investment Advisor.