



WEALTH
ADVISORSSM



SERVICES

- Goals-Based Planning
- Asset Management
- Tax-Managed Strategies
- Wealth Transfer Strategies

EDUCATION

- B.B.A., Finance, Saint Xavier University

COLLIN WOULFE

PRIVATE CLIENT ASSOCIATE

cwoulfe@orbawealthadvisors.com

O: 708.927.4468

Collin Woulfe is a dynamic and client-focused Private Client Associate with ORBA's Wealth Advisors, where he works with the team on the portfolio buildout process. Leveraging his understanding of market trends and their impacts, he conducts thorough research into past and present market behaviors, providing invaluable insights for enhancing client experiences. Collin collaborates effectively with a seasoned team of wealth management advisors on client relationship projects, demonstrating a commitment to excellence and client satisfaction.

His organizational skills shine in managing various applications to keep track of client information, ensuring efficiency and accuracy. Beyond his technical expertise, Collin's interpersonal skills are evident in his interactions with clients and financial professionals, striving to provide the best experience for everyone. His active participation in client meetings underscores his dedication to understanding and meeting clients' unique needs.

PROACTIVE

Collin is ambitious, hardworking, and outgoing – all traits that serve our clients well. He most enjoys building relationships with our clients and provides dedicated operational support to our wealth advisors.

OUTSIDE OF THE OFFICE

Outside of the office Collin enjoys golfing on the weekends with his friends, snowboarding in the winter and experiencing new adventures, whether they be trying new restaurants around the Chicagoland area, vacationing in places or trying out new activities.