



SERVICES

Goals-Based Planning
Asset Management
Tax-Managed Strategies
Wealth Transfer Strategies
Risk Mitigation/Insurance
Philanthropy & Gifting

CERTIFICATIONS AND LICENSES

- Chartered Financial Analyst (CFA)
- CERTIFIED FINANCIAL PLANNER™ (CFP®)

EDUCATION

- B.S., Public Management, Indiana University
Minor in Psychology and Public Finance

MICHAEL FURLA, CFA, CFP®

CHIEF INVESTMENT OFFICER & HEAD OF ORBA WEALTH ADVISORS

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As the Chief Investment Officer and Head of ORBA Wealth Advisors, Michael leads the wealth management team in providing clients with tailored investment portfolios and financial planning solutions.

Prior to partnering with ORBA Wealth Advisors, Michael held positions at well-established financial institutions including S&P Global Ratings and Morningstar.

In 2017, Michael joined a private wealth management firm where he served as Managing Director, Co-Head of Investments. During this time, he led the investment committee, developed the firm's investment philosophy, built and led the investment department, assisted with 14 M&A acquisitions, and helped scale and grow the advisory firm from \$800 million to \$12 billion in Assets Under Management (AUM).

Driven by entrepreneurial spirit, Michael then founded a financial technology company where he developed a patent-pending process for fixed income investing.

Michael's financial services and entrepreneurial journey have uniquely equipped him to connect with clients, understanding firsthand the complexities of business ownership. This perspective enables Michael to forge meaningful connections with clients, adeptly addressing their unique investment and financial planning needs.

PROACTIVE

Michael believes on-going communication is the foundation to successful outcomes. He puts the clients' interests first through a collaborative team-based approach to financial planning and investment management.

OUTSIDE OF THE OFFICE

Outside the office Michael enjoys spending time with family and friends. He enjoys the outdoors, fitness, reading and traveling.