/ about us /

CVA Family Office was established with the goal of providing holistic wealth management and financial planning advice to business owners, entrepreneurs, and their families. Our depth of experience and expertise over many years of working with this clientele has allowed us to better understand and address the unique needs & circumstances that are common among business owners.

CVA Family Office is an independently-owned Registered Investment Advisor with the Securities & Exchange Commission.

/ who we are /

DAVID TOLSON

managing director

+

CHRIS YOUNGER

managing director

+

MATT BLACKBURN

managing partner

+

DALYCE YOUNG

certified financial planner

+

what we do

CVA Family Office is a boutique, multi-family wealth management firm serving high-net-worth business owners & entrepreneurs. The invite-only nature of CVA Family Office allows us to provide outstanding service to a small number of client families.

Our services include personal financial planning, investment management, and coordination of outside advisors for proactive tax, estate and insurance planning needs.

If you would like more information about CVA Family Office, please contact us directly:

matt@cvafamilyoffice.com or **dalyce@cvafamilyoffice.com**

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