

# Alan E. Wolters, AIF®

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Alan is the managing partner of Moorman, Harting & Company's Celina office. He is also a Financial Advisor for Moorman, Harting Financial Services, Ltd and he has attained his AIF® designation. With over 25 years of experience, Alan specializes in:

- Providing up-to-date tax saving strategies for individuals and businesses
- Coaching businesses in understanding financial information and informing them of areas of improvement
- Tailoring a Method 10® financial approach for clients to meet their financial needs and goals
- Identifying areas of consideration for business and individual clients
- Recommending the appropriate insurance coverage for business and individual clients needs in order to protect their assets from financial disaster

Alan is a graduate of Marion Local High School and Wright State University with Summa Cum Laude Honors. Alan is very active in his community by volunteering in local, civic, and religious activities and organization. He is also a member of the American Institute of CPA's, Ohio Society of CPA's along with membership into the Financial Services Institute. Alan, along with his wife Tammy, reside in Maria Stein, Ohio, and are the proud parents of two daughters.

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*"I sincerely want to know and help my clients with their tax and financial needs. It requires being proactive, but personable, with clients in order for them to excel. When clients succeed as a result of my advice, it is the most self-fulfilling feeling that I can have."*

*Alan*