Mike Dickman, CFP®

Charles Schwab Financial Consultant,
Charles Schwab & Co., Inc.

Own your tomorrow™

Mike Dickman,
CFP®

VP - Sr. Financial Consultant

michael.dickman@schwab.com

(415) 667-6351

100 Post Street
San Francisco, CA 94108

Professional Profile

I can partner with you to understand your goals, create a personalized plan, and provide investing guidance. You'll understand where your money is invested and why, how your investments are performing, and how much it's costing you. Plus you'll have access to Schwab's portfolio management expertise, insights, and specialists. It's a modern approach to wealth management—so you can take ownership of your financial life.

Financial Credentials

- CERTIFIED FINANCIAL PLANNER™ Certificant
- Series 7, 63, 66 Securities Licenses
- Life & Variable Annuity Insurance License, CA Insurance License #0B27845

Experience

- 25 years of professional experience
- VP - Sr. Financial Consultant, Charles Schwab, 2020-present
- Director, Corporate & Retirement Services, Charles Schwab, 2000-2008
- Retirement Consultant, Hartford Life, 1997-2000
- Group Benefits Consultant, The Principal Financial Group, 1994-1997
- VP, Financial Consultant, Charles Schwab, 2008-2020

Education

- Master of Science in Financial Planning, Golden Gate University
- BS, Accounting, Upper Iowa University

Community & Professional Affiliations

- Western Pension & Benefits Council, San Francisco Chapter
- Financial Planning Association, San Francisco Chapter