



BDF founding principal Mike Foltz believes in giving business owners peace of mind about their family’s financial future. “I’m passionate about helping people make sound financial decisions and setting up their financial plan so that it works well, not only for themselves, but also for generations to come.”

Mike draws on 20 years as a practicing lawyer to review clients’ estate plans and determine how to address their business concerns, such as how stock or ownership interest in the company can be passed on in the most tax-efficient way.

As leader of the Business Owner team, Mike has led the development of a unique, comprehensive approach to evaluating and prioritizing the concerns that business owners face, as well as making recommendations to manage those considerations and quarterbacking the team of advisors to implement those recommendations.