



**The Estate Planning Council of Cleveland
presents...**

Distinguished Estate Planner 2024

Michael T. Novak

Michael Novak founded Wellspring Financial Advisors in 2007 and currently serves as President and CEO. He has extensive experience in the areas of estate planning, charitable gift planning, business succession planning, proactive tax planning and compliance, and family governance and education. Michael believes the key to successful wealth management is building strong relationships with clients and providing highly customized service that supports financial peace of mind.

Michael earned his Bachelor of Business Administration in Accounting and Finance from Ohio University. He is a Certified Public Accountant, a Personal Financial Specialist, holds the Accredited Estate Planner® designation, and is a 21/64 Certified Advisor. He is also a member of The Ohio Society of CPAs and a DEI Committee Member, and former RIA Advisory Board Member (2020-2023), of the Capital Group.

Michael is actively involved in his community, serving as a Board Member and former President of Bluecoats, Vice President of the Board of Ronald McDonald House Charities of Northeast Ohio, and Board Member of Solon Community Living. He is also a member of the Leadership Circle and Gift Planning Advisory Committees for the Cleveland Museum of Art, the Executive Roundtable for University Hospitals Diamond Advisory Group, the FBI Cleveland Citizens Alumni Association, and the Professional Advisory Council Steering Committee for the Jewish Federation of Cleveland. Formerly, Michael served as President and Board Member of the Estate Planning Council of Cleveland and Chair of the Endowment Committee for the Church of Gesù.