



Zachary S. Chavira, C(k)P®, AIF®
Retirement Plan Lead Advisor
Donaldson Capital Management

Zachary S. Chavira, C(k)P®, AIF® joined Donaldson Capital Management (DCM) in August 2017 and is Team Lead in Retirement Plan Services.

In his role, Zach serves DCM's corporate and small business retirement plan clients through employer-sponsored 401(k) and 403(b) plans. Zach graduated from the University of Southern Indiana with a degree in Finance and Marketing. Zach's experience includes previous roles in 401(k) administration, banking, and financial services. Zach has found his passion in the wealth management industry and loves helping people understand money, investments, and planning for retirement. Zach earned his Accredited Investment Fiduciary (AIF®) designation in 2017 along with his Certified 401(k) Professional designation in 2022, which further equipped him in his current role as an "investment fiduciary," a title that requires the clients' best interests be on the forefront of every financial decision.

Zach resides in Evansville, Indiana, with his wife, Lauren, their son, Crew, and their Yorkie-Poodle, Simba. Zach is a regular golfer, as well as a self-proclaimed foodie, boater, and traveler.