



Biography of David Thiele

Financial Advisor | Financial Planner

[Wealth Manager David Thiele](#) is an accomplished individual who develops and implements strategic financial plans for his clients while ensuring legal and regulatory compliance. For nearly 25 years, he has been navigating markets and investments. His commitment to providing the highest quality of service and advice is unwavering.

Thiele's expertise lies in wealth management, individual and corporate retirement planning, investment, portfolio construction, business succession planning, education planning, executive financial services, philanthropic services, and stock market analysis and expertise.

Thiele has his Series 24, 51, 52, 53, 7, and 66 and has an insurance license.

Co-Founder of Kalyx Capital Management

In 2016, David Thiele founded Kalyx Capital Management to empower individuals and families to achieve their financial goals through personalized, transparent, and strategic planning. Under Thiele's leadership, the firm fosters long-term relationships built on trust.



There is nothing cookie-cutter about Thiele and Kalyx Capital Management's approach, understanding that not one strategy fits everyone. Each client receives undivided attention – from planning to execution and follow-up. The team's proactive approach helps clients develop strategies to address their financial goals and objectives using the most efficient methods. Recognizing

that everyone encounters life challenges, Kalyx Capital Management strives to anticipate and address those situations as they occur. Clients can rely on Thiele and his team to keep them on track toward a meaningful and purposedriven financial future and provide the peace of mind that comes with financial security.

Kalyx Capital Management is committed to educating its clients about financial concepts and products and taking the mystery out of investing, insurance, estate conservation, and preserving wealth.

The firm provides Bonds, Common Stock, various types of IRAs, Brokerage Accounts, Treasury Bills, Government Securities, Treasury Notes, Variable Annuities, Retirement Plans, Tax Plans, 401(k) Planning, 403(b) Planning, College Plans, Estate Plans, Money-Purchasing Plans, Profit-Sharing Plans, Disability Income Insurance, Life Insurance, and Long-Term Care Insurance.



OSAIC Wealth

David Thiele is affiliated with OSAIC Wealth, the broker-dealer. OSAIC Wealth is one of the nation's largest providers of wealth management solutions and home to a diverse, service-driven community of professionals who believe that planning for the future should be transformative, not transactional.

Thiele advises clients on investment strategies best suited to their needs and goals. Clients rely on his expertise in financial plans and strategies to develop blueprints for long-term economic stability and growth, recommend financial products such as stocks, bonds, mutual funds, and insurance, create and maintain comprehensive financial plans that analyze client investment allocations, and manage client portfolios. He conducts due diligence before recommending any product or service to a client.

Thiele Began His Financial Planning Career with Morgan Stanley

Before his affiliation with OSAIC Wealth and co-founding Kalyx Capital Management, Thiele worked at Morgan Stanley for four years as a Wealth Manager. With Morgan Stanley, he honed his expertise and grew his clientele, offering them the same expert financial planning services he does today. This included developing long-term economic stability and growth, making financial product recommendations, maintaining comprehensive financial plans, analyzing clients' investment allocations, and managing portfolios. He also educated clients on various investment options available to them.



Academic Milestones

Thiele received his Master's in Business Administration (MBA) from the University of Oregon in Eugene in 2002. He received an MBA as part of the

International Program at the Copenhagen Business School in Denmark in 2001. His Bachelor's degree is in International Studies from Western Oregon University in Monmouth.

He graduated with multiple honors and received various awards while attending university.

His Career Is Thiele's Passion

David Thiele's passion for investing is not only his career but also his hobby. It's his full-time passion that distinguishes Thiele in his work.

On the Water or the Slopes

Thiele loves water sports, from waterskiing to surfing, paddle boarding, and wake surfing. He learned to waterski at 36, which he admittedly found challenging but took to like a duck to water. He also enjoys downhill skiing and cross-country skiing in the winter.

Thiele also ran around age 36 and completed the Portland and Bend, Oregon Marathon with an impressive finishing time. He and his wife Tina run five miles daily.



A Consummate Traveler

You can also add gardening and traveling to Thiele's list of extracurricular activities. He has visited more than 60 countries, experiencing different cultures, customs, traditions, and foods.

In addition, Thiele is the author of the fictional novel *Lethal Access*.

Volunteer Work

Thiele's volunteer work has taken him on multiple trips to South America, where he has participated in various charities. He has also volunteered at schools and events and donated to numerous charities.

Thiele was born in Montreal, Canada, grew up in Wisconsin, and moved to Oregon in the 1990s, settling in Bend, Oregon, where he lives with his wife and three children.



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