

NOTABLE WOMEN IN WEALTH MANAGEMENT



BizTimes Milwaukee is proud to present its inaugural showcase of **Notable Women in Wealth Management**, recognizing accomplished professionals who help clients grow their wealth and achieve their financial goals, while making a mark on a traditionally male-dominated field. The individuals on the following pages were nominated by their peers and highlight the talent in the region.

METHODOLOGY: The honorees did not pay to be included. Their profiles were drawn from nomination materials. This list features only individuals for whom nominations were submitted and accepted after a review by our editorial team. To qualify for the list, nominees must be based in southeast Wisconsin. They must be currently serving in a senior-level role at their firm, must hold a leadership position in their industry outside of their own organization, have made a significant contribution to advancing workplace equality at their own workplace or beyond, and act as a role model or mentor.



**JULIE
ELLENBECKER-
LIPSKY**

PRESIDENT AND SENIOR
WEALTH ADVISOR

**ELLENBECKER
INVESTMENT GROUP**

Julie Ellenbecker-Lipsky, president and senior wealth advisor of Waukesha-based Ellenbecker Investment Group, is a natural leader and mentor for the women of the firm, according to Sara McGuire, director of marketing for Ellenbecker Investment Group.

“Her commitment to fostering growth and leadership is evident in her promotion of continued education and encouragement toward roles on nonprofit boards and committees,” said McGuire.

Under Ellenbecker-Lipsky’s mentorship, 25% of EIG employees serve on boards, and more than 50% of the client care team members have earned additional certifications, “gaining the confidence and skills to excel, growing both personally and professionally,” McGuire added.

Ellenbecker-Lipsky served on the Rogers Behavioral Health Foundation board for 11 years and contributes to the Boys & Girls Clubs of Greater Milwaukee as a committee member and host of the S’more Fun event at Camp Whitcomb/Mason. She also participated in the Waukesha County Business Alliance’s 2023 workshop on cultivating a culture of corporate philanthropy.