

## ELLENBECKER CELEBRATES 20 YEARS

# Happy 20th Anniversary EIG!

**IT WAS A SNOWY** Christmas Eve twenty years ago when we put our name on the door and opened for business. Looking back, the vision to change the perception of the financial services industry, bring high quality investment options to clients and create an environment which fosters growth and opportunity for our employees has remained steadfast. We have grown to over 23 committed employees who are deeply aligned with our core values and have



Karen (l) and Julie (r) Ellenbecker

continued to add services and expertise to all areas of financial planning.

Our advisory teams remain focused on our clients while continuing to grow organically with new advisors and employees. Opening our second location in Whitefish Bay has made it easier for us to connect with our clients from Milwaukee and northern suburbs. In 2016 we launched our independent insurance division and continue to work with highly regarded investment partners to ensure our internal expenses are kept low and transparent. In today's market climate, where so many factors are out of our control, it is essential



Ellenbecker  
Investment Group

20 years

to manage both risk and fees resulting in a leaner more competitive portfolio.

Educating our clients and the community has become a focus for us over the years. We have over 20 educational seminars scheduled in our EIG Education Center this year and have opened our doors to non-profits in the area seeking a professional meeting space at no cost.

We are also excited to celebrate our anniversary with WISN. For 25 years, listeners have counted on Karen Ellenbecker and our team of advisors for reliable, relevant information designed to help with life's challenges. Each show includes our wealth advisors giving their own

financial perspective and interviews with local and global economists, attorneys, tax and real estate specialists, authors and other special guests. Archived shows are available online at [moneysenseradio.com](http://moneysenseradio.com). Additionally, we continue to offer our family conference room for multigenerational meetings and emphasize the importance of including future generations in the planning process and passing on more than just a financial legacy.

We are proud of our fiduciary standard, core values, ethics and integrity and history of doing the right thing which has helped us earn the BBB Torch Award for Ethics – three times. We look forward to continued success by delivering the highest level of investment advice, service and transparency over the next 20 years. Thank you for choosing us to be your financial planning partner.

## You Deserve an Advisor Who Listens

"Ellenbecker Investment Group is excited to celebrate 20 years of providing exceptional planning and extraordinary service to individuals, families and businesses. As a small business, it is not only remarkable to reach this grand milestone, it is also a testimony to our clients for their loyalty. Thank you!"

*Karen Ellenbecker*

Karen J. Ellenbecker  
Founder & Senior Wealth Advisor

*Julie Ellenbecker Lipsky*

Julie Ellenbecker-Lipsky, CFP®, CDFA™  
President & Wealth Advisor

Invest with us.

[ellenbecker.com](http://ellenbecker.com)

N35 W23877 Highfield Court, Suite 200  
Pewaukee, Wisconsin 53072 (262) 691-3200  
705 E. Silver Spring Drive  
Whitefish Bay, WI 53217 (414) 727-6920



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