

Kasten Private Wealth Management Award

Jeff Schmit and Shelly Buestrin recognized for commitment to client service



Jeff Schmit
Senior Investment Consultant

Shelly Buestrin
Client Specialist

“On top of everything else, Jeff is a terrific family man. He is very much involved in the everyday life of his wife and kids – coaching kids’ sports, math homework at the kitchen counter, getting up at three in the morning with a sick kid – it’s all part of Jeff’s love for his family.”

– Dan Hawley
Financial Advisor

Ever since Jeff Schmit joined Baird as a Financial Advisor in 1996, he has been known as a coach and a mentor to colleagues and clients alike. His tireless work ethic combined with his upbeat, jovial attitude make him the epitome of the Baird culture in the Milwaukee North Shore branch and beyond.

Together with his Client Specialist Shelly Buestrin, who joined him nearly five years ago, Jeff has demonstrated an absolute commitment to delivering great outcomes for clients at every stage of their lives. For that, Jeff and Shelly are being honored as this year’s Kasten Award winners for Private Wealth Management.

This dynamic duo is dedicated to making sure their clients are well cared for. In one recent instance, it became apparent that one of their clients, an elderly woman who also had an account with another firm, was having unauthorized withdrawals made on that account. Jeff and Shelly worked to get to the bottom of the situation, unveiling a complicated and uncomfortable family situation that they ultimately were able to help resolve. The client was so pleased that her daughter-in-law sent a letter to Chairman Paul Purcell praising Jeff for his “steady hand through a shaky situation even though he didn’t benefit financially. He just did what was best for his client. Jeff has truly gone above and beyond his job description,” she wrote.

Jeff is known among his colleagues for always going above and beyond what is expected of him. Whether it is hiring Elvis for the office holiday party, as he did last year, treating the support staff to ice cream, overseeing a college student’s stock simulation project or mentoring a colleague, Jeff is considered the embodiment of Baird’s culture.

Madeleine Hayes, PWM Analyst, sees Jeff as a role model who has advised her on many occasions as her role and responsibilities at Baird have grown. When she recently moved into her own office at the branch, Jeff surprised her with a gift to decorate her office. “The act was so generous and thoughtful, I was literally moved to tears,” said Madeleine. “As I continue to navigate my career, I know I can count on Jeff for guidance or just a friendly smile.”

Paul Westphal, Branch Manager, echoes those sentiments. “Jeff has been my sounding board, my guide, my steady hand and the guy I can always depend on for a laugh. He has coached me on the history of the branch and is the picture of culture here. He portrays it each day.”

Paul points to culture as a key example of the partnership between Jeff and Shelly. “Shelly is the culture queen. She makes clients feel special every day and is always working to make Baird and our branch a better place. Not only does she care about success for our clients, she cares how they achieve success. Integrity is everything to Shelly.”

Outside the office, both Jeff and Shelly enjoy spending time with their families. Jeff and his wife, Angel, stay very busy with the activities of four kids aged 8-16. “On top of everything else, Jeff is a terrific family man,” said Dan Hawley, Financial Advisor. “He is very much involved in the everyday life of his wife and kids – coaching kids’ sports, math homework at the kitchen counter, getting up at three in the morning with a sick kid – it’s all part of Jeff’s love for his family.” ►

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continued

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Branch Manager

Jeff is also heavily involved in the community, serving on the board of Ozaukee Family Services since 2000. He also is a member of the board for the Port Catholic School Endowment Fund and former co-chair of the Port Catholic School Key Event. He has served the Port Washington Lions Club and was a founding member of the American Cancer Society Relay for Life in Port Washington, which has raised hundreds of thousands of dollars for cancer research and support of cancer survivors.

Shelly's greatest joy comes from spending time as a family with her husband, Tom, and their young daughter, Grace. Shelly also has a crafty side and makes writing journals out of old hardcover books.

As Kasten Award winners, Jeff and Shelly each received a crystal award and a gift certificate. ■