

MILWAUKEE BUSINESS JOURNAL

Philanthropy, education an Ellenbecker cornerstone for 25 years

Ellenbecker Investment Group (EIG) is so much more than meets the eye. Now celebrating its 25th year in business, the firm has built a foundational reputation around ethics and integrity in the field of wealth management. Mother and daughter team Karen Ellenbecker and Julie Ellenbecker-Lipsky have formed a company that not only provides transparent, fee-based advice for its clients as a fiduciary, it has amplified its role to foster deep community involvement, and a culture of giving back.

"Celebrating 25 years has been a real accomplishment," said Ellenbecker-Lipsky, now president at the firm which manages over \$1.3 billion in investments. "That comes from being able to help families with their financial planning, and also the privilege of leading 35-plus employees. Even though my mom and I are quite different, we have the same core values

and common goal which is why we've been so successful over 25 years."

And that common goal includes core values steeped in education and philanthropy.

EIG's well-known weekly radio show "Money Sense" has worked to educate investment consumers for nearly 30 years. What's more, the firm's Pewaukee headquarters for 15 years has featured an Education Center that routinely hosts informational events. Event topics are as wide ranging as health and wellness, legacy planning, financial coaching, and groups that meet on a monthly basis including a widow's group, Bible study, sustainable living and investing, as well as ways to inspire one's retirement goals.

"We built our Education Center in 2006 with a commitment to educating our clients and employees," said Ellenbecker-Lipsky. "Our commitment to education is a huge differentiator for us. Access to information is critical....

and that's not to be mistaken with marketing."

It can be said that integral to wealth planning is planning to give back. And through another popular radio broadcast entitled Milwaukee's Philanthropic Community, EIG routinely highlights non-profit organizations and helps listeners understand how they can have a personal impact in their communities. EIG's employee culture too is immersed in that ethos of philanthropy, the firm each year provides all staff members with \$1,000 to gift to a charity of their choice, among other initiatives.

"We have a strong connection and intention around philanthropy," said Ellenbecker-Lipsky. "We want to model philanthropy for other businesses and our employees. We give a portion of our gross revenue away to charity every single year."

Impactful and exciting years

surely lie ahead for Ellenbecker Investment Group as it's about to close on a new, 20,000 square foot stand alone headquarters in Pewaukee. The facility will undergo a complete renovation buildout, and will feature an expanded Education Center, a new Executive Retreat Center and additional expansion of its Charitable Foundation. The headquarters will also feature an expanded service built on wealth coaching designed for individuals seeking additional assistance above and beyond the tactical steps of their financial plan. The firm also has branches in Whitefish Bay and Bonita Springs, Fla.

By any measure, EIG's first quarter century has been an unmitigated success. Through efficient and unbiased investment advice, and a reputation enhanced by a culture of education and philanthropy, its next 25 is sure to follow suit.

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