

Karen J. Ellenbecker

Professional Experience:

December 1996 to Present. **Ellenbecker Investment Group, Inc.** (EIG) Founder & Sr. Wealth Advisor for a fee-based, woman-owned investment advisory firm located in both Pewaukee and Whitefish Bay, Wisconsin. Ellenbecker Investment Group is a Registered Investment Advisor. Utilizing over twenty-eight years of diverse experience in the financial/investment field and achieving a profit each year, the firm now manages over \$500 million dollars in assets. With no proprietary products, EIG offers clients the best investments without any hidden interests. The company is well established and active in the Greater Milwaukee area. Due to the unique opportunities available through Karen's weekly radio show, "Money Sense," EIG has developed important relationships with money managers, economists and businesses locally and nationwide. The firm is strategically positioned to be competitive with trust companies. The company currently employs twenty-four full and part-time associates.

March 1990 – December 1996. **Dain Bosworth, Inc.** Milwaukee, Wisconsin. Vice President, Investment Officer.

December 1988 – February 1990. **Marshall & Ilsley Trust Company,** Vice President and Trust Officer for New Business Development.

September 1984 – December 1988. **Robert W. Baird & Company, Inc.,** Milwaukee, Wisconsin. Vice President, Investment Officer.

Special Experience:

Combining the best services from the financial and banking industries to develop a superior approach to investing, similar to a Family Office.

Founder of the EIG Charitable Foundation, Wisconsin Chapter of Stand Up & Play, and the Lake Country Charity Connection.

1989 to Present, Host of "**Money Sense**," weekly talk radio show on WISN 1130 AM. Interviews a wide variety of experts (money managers, bond portfolio managers, economists, business owners, and authors) locally, nationally and internationally. This valuable exposure to the variety and diversity of guests throughout the years has opened up avenues that are not typically available to most investment advisors. This access has created many competitive and cutting edge ideas that have been incorporated into innovative investment strategies.

Professional speaker who has given numerous educational seminars for continuing education credits, conferences, businesses, schools and professional organizations.

Professional Licenses:

Security licenses: Series 7, 24, 63 and 65. Life, Health and Disability Insurance.

Community Involvement:

Member of IAFP (International Association for Financial Planning), Professional Dimensions, Pewaukee Yacht Club and founding member of Waukesha Memorial "Women Connected" Group. Member of the Investment Committee for the Wisconsin BBB.

Serves on the board of: Foundations Bank, Milwaukee Film, and Wisconsin Club.

Member of: Chenequa Country Club, The Wisconsin Club, Women's Club of Wisconsin, and Milwaukee Yacht Club.

Awards/ Successes:

EIG has shown a profit each year.

George Dalton Inspirational Entrepreneur Award 2013.

Milwaukee Business Journal's Women of Influence Award 2013.

Woman of Distinction Award 2008.

EIG was awarded the BBB Torch Award for ethics and integrity in both 2005 and 2010.

Waukesha County Chamber – BizTimes Milwaukee Top Ten Small Business 2001 and 2010.

Benedict Center Justice Award 2001 for work and creation of Reconstruct.

Top Producer at SII Investments, Inc. Since 1997, has ranked in the top 10 of Top Producers at SII Investments, Inc. each year.

Graduate of Leadership Intensive Program

Graduate of Future Milwaukee, an influential group of emerging community leaders.

Personal:

Enjoys spending time with her seven grandchildren and extended family, cooking, bridge, traveling, fly fishing, photography, and boating.