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**Columbus Financial**

# Your Money, Our Priority

At **Northwestern Mutual,** the **River Tree Wealth Management** team provides exceptional financial guidance to clients seeking a steady hand and honest advice.

Picture a business owner about to sell their company. It's a bittersweet moment, but they're ready for the transition. Faced with a stack of paperwork, they start to wonder: "If I sell the company for a certain amount, is it enough to take care of my family? Are my financials buttoned up? What am I overlooking?"

"Having an experienced financial advisor during milestone events like this can save business owners time, money, and headaches," says Shawn Phelps, founder and partner at the River Tree Wealth Management team at Northwestern Mutual. "Whether it's retirement, changing jobs, or a major liquidation event, we help professionals, entrepreneurs, and business owners take that next step with assurance."

"Making positive decisions around financial security that yield the least amount of tax consequences is essential during sensitive times," says partner Brandee Wyzlic. "We have a genuine concern for our clients' dollars, and it shows."

## Trusted Advice at All Stages

When Phelps and Wyzlic joined forces in 2013, they fused a winning set of skills. Phelps' background in investment banking and trusts, combined with Wyzlic's accounting and investing acumen, gives them a wealth of collective experience and fluency in several financial languages. It means that when high net worth clients come to them with questions, they provide honest answers and practical advice delivered in comprehensible terms. "Communicating in a way that's meaningful to clients is an art," says Wyzlic. "I can go deep into the weeds or distill practical wisdom—however they prefer." It helps that Phelps and Wyzlic follow their own advice. "Ninety percent of the time, when we make a recommendation to a client, we own that same insurance, same product, or same mutual fund," Phelps says.

Whereas some financial advisors limit services to money management or product sales, Phelps and Wyzlic engage clients in meaningful and long-term conversations around planning. "We're figuring out the next five or 10 steps of their financial plan with them," says Phelps. Allowing clients to take ownership of that plan while still providing motivational guidance is a hallmark of River Tree Wealth Management. It's also why Phelps and Wyzlic enjoy a sterling reputation among Northwestern Mutual financial advisors, many who seek their expert hand on complicated cases. In fact, about a third of Phelps' clients have come from other financial advisors.

While skilled in traditional financial matters such as retirement, estate planning, and investing, Phelps and Wyzlic provide financial guidance during all of life's stages. They specialize in complex business planning as well as trust and estate planning, and have helped clients' grown children expand their professional networks, settled family disputes about relocation decisions, and even helped clients consider purchasing a vacation home. For Phelps and Wyzlic, it's all part of their holistic approach to financial management. "When you become a family's CFO, you're engaged in day-to-day financial operations, and we welcome that role," Phelps says. "We care deeply about everything we do," adds Wyzlic, "and that translates into how we treat our clients."

Northwestern Mutual®

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