

AS SEEN IN *Time, Fortune & Entrepreneur*

COLUMBUS

WEALTH MANAGEMENT LEADERS

Managing Wealth and Relationships

Founded on a vision to help clients build and transfer wealth one relationship at a time, **River Tree Wealth Management** meets people where they are on their financial journey.



**FROM LEFT
TO RIGHT:**
Private Wealth
Advisors
Justin Fickes,
MEd, ChFC®,
Partner;
Brandee Wyzlic,
B.S., RICP®,
Co-founder;
and Shawn
Phelps, MBA,
Founder.

“Fun” isn’t often a word that comes to mind when someone thinks of financial planning, but for Northwestern Mutual team River Tree Wealth Management, the word sits at the top of their core values. And they mean it.

“The process of growing a business involves learning from mistakes, and that can be a discouraging conversation if the mood isn’t kept light,” says Shawn Phelps, MBA, founder and private wealth advisor. “We meet with clients to discuss serious topics like their legacy and taxes but do so in a relaxed, learning-centered environment. I love seeing people take a sigh of relief when they understand their finances and feel confident in their next decision.”

Whether working with an established business owner, affluent individuals, or families, the central Ohio-based team keeps meetings personal and enjoyable,

helping clients feel safe to discuss their financial goals and visions, then develop flexible strategies.

“We want to be a biographer of our clients’ lives, taking time to listen and ask questions to understand who they are and how finances fit into their life and legacy,” says Phelps. “Initial meetings are devoted to understanding goals and experiences as well as balance sheets and tax returns. We help clients allocate and grow their resources based on what motivates them and how they want to be remembered.”

“Wealth management and retirement planning is a relationship business,” adds Brandee Wyzlic, B.S., RICP®, co-founder and private wealth advisor. “Deep dialogue reveals conviction and results in trust. Our clients rely on us to quarterback conversations with their tax and legal advisors—in addition to their loved ones—as we navigate

the roadmap of their financial journey.”

The River and the Reservoir

The office of River Tree Wealth Management sits at the banks of the Olentangy River, which serves as a poetic symbol of how the team views wealth management.

“When it comes to wealth, sometimes you act as a river and other times a reservoir,” says Phelps. “There are times to let capital flow, investing in the causes and people you love, and other times to hold assets tightly and stockpile growth.

“Tax-efficient wealth transfers enable you to pass more of the wealth you’ve worked so hard to build to future generations,” Phelps continues. “And now is an opportune moment for those with substantial wealth to take advantage of potential tax savings that could increase their wealth transfer by millions of dollars.”

When the clock strikes midnight on December 31st, 2025, a key provision of the Tax Cuts and Jobs Act that impacts the lifetime estate and gift tax exemption is set to expire. By creating an estate plan before then, people may be able to take advantage of the exemption while it’s still at a historic, all-time high.

River Tree Wealth Management recommends individuals with at least \$5 million in net worth or couples with at least \$10 million in net worth begin planning now for this change. Younger taxpayers with at least \$3 million in net worth—or \$6 million for couples—combined with a high income and/or strong asset growth potential may also have a planning opportunity.

If you think the change in the lifetime estate and gift tax exemption may impact you, a conversation with River Tree Wealth Management is a great place to start.



RIVER TREE
WEALTH MANAGEMENT

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