

WHN Investor Services, Inc.

300 N. Corporate Drive, Suite 215
Brookfield Lakes Corporate Center
Brookfield, WI 53045

“Having money and growing it and keeping it are all different subjects.” - Unknown Author

OVERVIEW





For over 25 years our business premise has been simple.

In an era of fast moving complexity and short-term thinking, our high net worth individuals and corporate consulting clients appreciate clarity and simplicity. In a collaborative way, we work with our clients to establish lasting solutions.

We are totally independent, employee-owned, and have no proprietary financial products. We offer a fee-based service and accept no compensation for any other entity, custodians, management firms, or administrators.

Relationships are the foundation of our business.

Based on long-term relationships we focus on the quality of advice rather than on the quantity of services offered. We provide relevant ways to create customized portfolios that are singularly focused on our clients and are not encumbered by proprietary financial products and other conflicts of interest.

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WHN Investor Services, Inc. ("WHN") is an investment advisor registered with the U.S. Securities & Exchange Commission ("SEC") and notice filed in various state jurisdictions. This website is limited to the dissemination of general information pertaining to WHN's investment advisory services. More

detailed information regarding the services provided by WHN can be found by reviewing WHN's Form ADV on file with the SEC at www.adviserinfo.sec.gov.