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I want to explore:

PERSONAL &  
FAMILY SOLUTIONS

BUSINESS SOLUTIONS

## It's time to be confident in your financial future.

Your family. Your business. Your legacy. Life's defining moments deserve more than traditional financial advice – advice that extends beyond what standalone financial planning and investment management can offer. But then again, we're not your "traditional" financial advisor. Our wealth management practice is guided by a CPA-based philosophy. We constantly challenge ourselves to find better, tax-efficient solutions for our clients – and we're prepared to tackle the tough questions.

For two decades, Wipfli and Wipfli Financial have helped thousands of clients – from individuals to families to small businesses and retirement plans – plan and invest toward their financial aspirations. In our opinion, "integration" is the magic word when it comes to ensuring long-term financial success. Together, we'll design a proactive financial, tax and investment plan that instills the confidence you need to achieve your personal and business goals, on your terms.

# Get the Latest

## MyStoryboard Interactive Planning

Imagine if you had the opportunity to rehearse the major turning points of your life before they happened.

Envision, stage and sketch out your next steps with MyStoryboard (</financial-planning/for-individuals-and-families/interactive-financial-planning>), our interactive financial planning platform designed to bring your future — your most sought-after ambitions and life's unexpected surprises — to the forefront.

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[Start Planning Today \(/financial-planning/for-individuals-and-families/interactive-financial-planning\)](/financial-planning/for-individuals-and-families/interactive-financial-planning)

### NEWS

**Wipfli Financial Advisors Again Makes Accounting Today's Top Wealth Magnets List** (</about/news/2019/wipfli-financial-advisors-makes-accounting-todays-top-wealth-magnets-list>)

**Wipfli Financial Promotes Expanded Leadership Team From Within** (</about/news/2019/wipfli-financial-expands-leadership-team>)

**Wipfli Financial Advisors Appoints Jeff Pierce as Chief Executive Officer** (</about/news/2018/wipfli-financial-appoints-new-ceo>)

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## Personal & Family Solutions

### Featured News

Wipfli Financial Advisors Again  
Makes Accounting Today's Top  
Wealth Magnets List

<https://www.wipflifinancial.com/about/news>

Wipfli Financial Advisors Earns  
Third-Consecutive Best of  
Business Award in the Twin Cities

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