



APPLETON GROUP, LLC

INVESTMENT SOLUTIONS · WEALTH MANAGEMENT
EMPLOYER-SPONSORED PLANS · CHARITABLE

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The Appleton Group is an independent Registered Investment Advisor offering objective, unbiased wealth management, research and investment advisory services. As a mid-sized privately held firm, we work to help private clients, employer-sponsored retirement plans, non-profit endowments and financial institutions build and manage more predictable, sustainable and profitable portfolios over time.

As a trusted fiduciary, we have an obligation to help our clients meet their long-term financial goals, while minimizing investment expenses and encountering only prudent risks along the way.

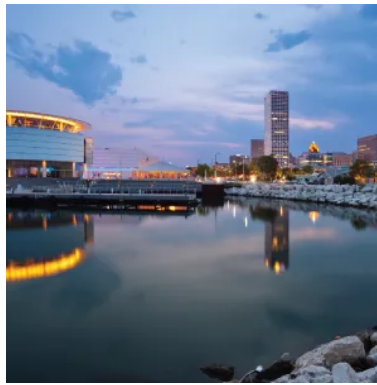
Appleton Group strives to be the region's most admired wealth advisor, serving our clients with honesty, independence, and integrity.

We Serve...



Private Clients

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Employer - Sponsored
Plans

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Non - Profit Endowments

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Selecting the right Appleton Group core investment strategy has never been easier. We offer a complete lineup to meet the specific needs of every investor.

**CLICK HERE FOR OUR NEW
INTERACTIVE STRATEGY SELECTION
TOOL**

Ask a Question – In Fact, We Encourage It...

- + Who does Appleton Group typically serve?
- + What services do you offer for individuals and families?
- + What services do you offer for retirement plan sponsors?
- + What services do you offer for non-profit endowments?
- + What services do you offer to other financial institutions?
- + How much can I expect to pay for your services?
- + Who are your competitors?

APPLETON GROUP
SERVICES

- > Private Clients
- > Employer-Sponsored Plans
- > Non-Profit Endowments
- > Investment Solutions

RECENT POSTS

- > Appleton Group Charitable Wins More By Losing Less
March 18, 2019
- > Three Minute Trend Talk™ – Weathering Uncertainty
February 7, 2019
- > Quick Comment – December Market Weakness Continues
December 21, 2018

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APPLETON GROUP
PORTFOLIO FINDER TOOL](#)

