Know The
Difference™

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Get Started »

Team

We provide exceptional service through a team of experts spanning nearly every area of wealth management; in-depth investment, estate, retirement, and tax planning.

What that means:

- Don’t waste valuable time shopping for a partner whose interests might not align with yours.
- It’s improbable to think one person can effectively manage your wealth management needs. Wealth management takes a team under one roof.
- The Annex Wealth Management team is built to tackle unanticipated needs quickly and effectively.

Tech

Starting with a nearly paperless onboarding process, access to account information and planning is clear, concise, and delivered over a confidential platform. Our responsive client service managers are only an email or phone call away, and our technology is highly efficient and exceedingly secure.

What that means:

- All digital planning and documentation is encrypted for highly-reliable security.
- Annex Wealth Management's financial plans are scalable. Simply put, it can be as in-depth as you choose and will evolve to address your changing needs.
- Count on timely updates on trends and strategies shared through video, audio and e-mail.
- We make it easy to meet. You decide: in person at one of our locations, or through our secure online office, Annex Everywhere. Staying in touch with the Annex team is a piece of cake.

Trust

Trust is our #1 goal. As a fee-only Registered Investment Advisor, Annex Wealth Management earns trust through a commitment to a fiduciary standard of care and unbiased advice.

Fee-only means we're independent. We're not beholden to a parent company, bank, insurance, or trust company, where conflicts of interest are a natural byproduct. Annex Wealth Management doesn't have proprietary or 'in-house' financial products to sell.

What that means:

- The vast majority of financial professionals are **not** fiduciaries. Know the difference.
- The guidance we provide is in *your* best interest - not the sale of investments that deliver commissions.
- Zero sales pitches. You don't need complicated financial products and we don't sell them.
- We put it in writing. If a financial professional *claims* to be an independent or a fiduciary, ask to see it in writing.
- Annex uses only independent custodians. Your money is held at a carefully chosen third-party national institutional custodian, like TD Ameritrade, Schwab or Fidelity, avoiding perceived or potential conflicts of interest.
- We've been recognized as a top advisor by the Financial Times, Financial Advisor, and Barron's.*

Pfister

Elm Grove

Our Locations

Locations


Lake Country
Branch Office
RUFFS PRESERVE
Naga-Waukee War Memorial Golf Course
Golf Rd
Hillside Dr


Pfister
Branch Office
42 Lounge
E Mason St
Hotel Metro
FedEx Office Print & Ship Center
E Wisconsin Ave
N Jackson St


Elm Grove
Headquarters
Sunset Playhouse
HIGHWOOD
UPS Customer Center
W Potter Rd
Trader Joe's


Mequon
Branch Office
W Mequon Rd
W Market St
Culver's
Cafe 1505
Chancery Pub & Restaurant

How We Work with You

Financial & Retirement Planning

Financial planning is an ongoing process, not a product. It always considers who you are with a keen eye on your goals, taxes, estate, and retirement.

Investment Management

Our investment team is focused on quality control, risk variation monitoring, consideration of current holdings performance and potential investment opportunities. We focus on balancing risks and protecting portfolio withdrawal needs for our clients in retirement.

Objective Risk Management & Insurance Assessment

We'll help evaluate insurance needs and the most efficient methods to address financial risks. Based on objective planning, we can help review your existing insurance policies.

Tax Preparation & Planning

Navigating tax strategies – before and through retirement – requires a thorough understanding of your circumstances, including your financial plan. We also incorporate key strategies like distribution planning, Roth conversions, and tax-loss harvesting into our tax planning.

Estate & Legacy Planning

One-size-fits-all estate plans don't exist, at least not here. Annex Wealth Management learns your unique circumstances, and with the help of our estate planning attorney, guides you through the process.

Financial Education & Discovery

Annex Wealth Management has an in-house content team that creates informative pieces at our Elm Grove headquarters.

401(k) Plans For Business

Managing a retirement plan that does what's best for your employees isn't just a positive goal – it's what the government requires. We'll help you fully understand and carry out what's required.

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Meet the Team

After decades of planning and preparation, Annex Wealth Management has established a way of doing business that promises the same warm, personal, one-on-one interaction to all clients. Using state-of-the art technology, analytics and review, our staff of skilled professionals constantly seeks to confidently deliver an elite, full-service wealth management experience.

Meet the Team »

As Seen In

WSJ

FOX6 MILWAUKEE

IN

FINANCIAL ADVISOR FA

FT FINANCIAL TIMES

FA IQ

CNBC

The Business Journal SERVING GREATER MILWAUKEE accountingTODAY

Bloomberg Law

As Heard On

RADIO 620 WTMJ

NEWS/TALK 1130 WISN

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