

Notable Leaders in Wealth Management: Julie Ellenbecker-Lipsky

Class of 2026

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Ellenbecker Investment Group

Julie Ellenbecker-Lipsky

Julie Ellenbecker-Lipsky is president and senior wealth advisor at Waukesha-based Ellenbecker Investment Group. During the past year, she led the firm during its 30th anniversary.

Colleagues say her leadership reflects intentional growth and a whole-person approach, integrating investment management, tax strategy, estate planning and life goals.

“Julie is a dedicated mentor,” said Ellenbecker chief people officer Cara Olson. “She leads with clarity, empathy and consistency, creating alignment while empowering team growth and maintaining strong values.”

Ellenbecker-Lipsky created The Wealth Seed program, designed to provide accessible financial guidance and education in the early stages of wealth building. Since its launch – through podcasts, educational guides, monthly communications and seminars – the program has engaged 500-plus participants.

She also serves on the board of The Women’s Center in Waukesha, is a committee member for the Boys & Girls Clubs of Greater Milwaukee, Camp Whitcomb/Mason and leads the EIG Charitable Foundation, which provides support and grants to other qualified nonprofits.

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