

30 Years of Thoughtful Growth: EIG Celebrates a Legacy of Boutique Service and Community Impact

From a kitchen table vision to an established financial partner, EIG celebrates three decades of redefining wealth management through education, integrity, and philanthropy.



Pewaukee, WI (January 2026) – It began with a kitchen table, a vision, and a belief that financial planning should be about people, not products. In 1996, Karen Ellenbecker sat in her home with a radical idea: to build a firm rooted in trust, transparency, and education. Thirty years later, that vision has blossomed into Ellenbecker Investment Group (EIG), a boutique wealth management firm known not only for its financial expertise, but also for the personalized attention it extends to both clients and employees, a white-glove approach rooted in deep commitment to community and care.

When Karen first opened her doors, she wanted clients to feel seen and heard. “I wanted to create a firm where relationships mattered more than transactions,” she recalls. “Where we took time to listen to what mattered most to each person and built plans around their values and priorities.” That philosophy—placing honesty and education at the center—has guided EIG for three decades and continues to shape every client interaction today.

As a female entrepreneur in a male-dominated industry, Karen was a pioneer. She established one of Wisconsin’s earliest fee-based financial planning firms, breaking new ground at a time when commission-based models were still the norm.

From the start, EIG’s advisors embraced a fiduciary standard, ensuring that every recommendation was made with the client’s best interest in mind. Fees were transparent, conversations were empowering, and relationships became long-term partnerships. Some of those early clients are still with the firm today, along with their children and grandchildren, a testament to the deep trust built over three decades.

Julie Ellenbecker-Lipsky, Karen’s daughter and now President and Senior Wealth Advisor, describes the firm’s journey as “intentional and thoughtful.” While EIG has expanded services and embraced innovation, its boutique promise remains unchanged: clients always come first. “That’s what makes us different, and it’s what will carry us into the next 30 years,” Julie says.

A Culture of Care and Community

EIG’s impact stretches far beyond financial planning. Through the EIG Charitable Foundation and initiatives like *Milwaukee’s Philanthropic Community (MPC)* podcast, the firm amplifies nonprofit voices and encourages employees to give back. Each team member receives \$1,000 annually to donate to a

charity of their choice, and the firm regularly hosts educational seminars, a veterans appreciation event, and opens its Education Center free of charge to local nonprofits.

This culture of care has earned EIG recognition across Wisconsin. The firm is the only local wealth advisory firm to win the [BBB Wisconsin Torch Award for Ethics](#) four times, and it has been named among the [Milwaukee Business Journal's Best Places to Work](#).

Celebrating 30 Years

As EIG celebrates its 30th anniversary, the firm looks forward as much as it looks back. Now with more than 50 employees, EIG maintains a consistent client-to-advisor ratio that ensures personalized service remains paramount. Strategic investments in advanced planning tools and secure digital solutions position the firm for continued thoughtful growth. In 2021, EIG further strengthened its long-term vision by purchasing its Pewaukee headquarters, a milestone that reflects the firm's commitment to planting permanent roots in the community it has served for three decades.

Looking Ahead

Beyond infrastructure and planning tools, EIG continues to educate and connect with the broader community. Its long-running *Money Sense* radio program, now in its 35th year, has evolved into a dynamic podcast series that brings fresh voices and perspectives to financial education. In addition, *Milwaukee's Philanthropic Community (MPC)* radio show, launched seven years ago to highlight nonprofit leaders and community changemakers, is also expanding into podcast form, ensuring its mission of amplifying local voices reaches an even broader audience.

For Karen, the heart of EIG's success remains simple: "It's about people. It always has been." Thirty years later, that original intention still guides the firm—to serve, to teach, and to walk alongside every person seeking financial confidence and peace of mind.

About Ellenbecker Investment Group

Headquartered in Pewaukee, Wisconsin, with locations in Whitefish Bay, Wisconsin, and Bonita Springs, Florida, Ellenbecker Investment Group (EIG) has been providing fee-based financial and investment services since 1996. The female-owned firm manages over \$2.1 billion in assets for clients in nearly all 50 states, including individuals, families, nonprofits, and corporations. The firm works diligently to address each client's particular situation and needs, ranging from consultation services, tax planning and estate planning to ongoing wealth management services. EIG has an A+ Better Business Bureau Wisconsin (BBB) rating and is the only wealth advisory firm to receive four BBB Torch Awards for Ethics (2005, 2010, 2016, 2023). For more information, visit Ellenbecker.com, call (262) 691-3200, or email info@ellenbecker.com.

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