We are pleased to announce that LCV Wealth Management, Ltd has joined Wipfli Hewins Investment Advisors, LLC.

LCV Wealth Management, Ltd. (LCVWM), based in Rockford, IL was established as a subsidiary of Lindgren Callihan Van Osdol & Co., Ltd (LCV) in 1996. LCVWM principally serves clients in the Midwest, focusing on the unique needs of high net worth individuals. LCVWM's dedicated client-centered approach and investment philosophy closely coincides with that of Wipfli Hewins, which paved the way for a synergetic and seamless merger. This acquisition has resulted in the addition of a new Wipfli Hewins office in Rockford, IL, further expanding the firm's presence in the Midwest.

We are also very pleased to welcome Scot Roche, J.D., CPA, PFS and Lisa Berlage, CFP®, MBA of LCVWM to the Wipfli Hewins consulting team. They bring with them a combined twenty years of experience, adding even more value and dimension to our consulting team.

Scot joins us as a Principal and Regional Director. Scot concentrates his practice on Investment Advisory Services, Estate Planning, Tax Planning, and Risk Management Planning. At LCVWM, Scot served as an Executive Officer and a leading member of their consulting team for eight years. Prior to joining LCV as a Manager in 2002, Scot worked in the tax and wealth management divisions for a major national accounting firm for several years. He graduated with a BA in Accounting from Grand View College and attended Marquette University of Law where obtained his Juris Doctorate.

Lisa joins us as a Senior Associate Consultant. Lisa focuses on delivering exceptional support for our high net worth clients in the Rockford area. Prior to joining the Wipfli Hewins team, Lisa served as a Supervisor and Advisor at LCV Wealth Management for over seven years. She entered the industry when she joined a local bank, where she spent three years as a Trust Officer. Lisa earned an MBA from Rockford College and is a graduate of Northern Illinois University, where she obtained a BA in General Studies, Liberal Arts.

Wipfli Hewins Investment Advisors, LLC (Wipfli Hewins) is an independent, national SEC-registered, fee-only investment consulting firm that provides investment advisory services and comprehensive financial planning services to a wide range of retirement plans, families, high-net worth individuals, foundations and endowments. Founded in 1999, Wipfli Hewins is headquartered in San Mateo, California, with offices in Florida, Illinois, Minnesota, Missouri, Oregon and Wisconsin.

Our experienced professionals provide expert financial planning and disciplined investment management, carefully considering taxes at every step, in order to help you achieve your goals and make your complex financial life a little easier. Embracing their fiduciary responsibilities, Wipfli Hewins is committed to understanding your unique needs, and providing the time and resources to formulate a prudent investment strategy to help you protect and grow your wealth.