Bio | ED DRAKE

Ed Drake joined Hewins Financial Advisors in 2005 with more than 15 years of experience in accounting and financial services. He provides wealth management and personal financial services to individuals as well as retirement and tax planning through Wipfli.

"Our key advantage at Hewins is our broad spectrum of experience and services," Ed says. "We bring a high level of care to our clients through many areas of personal financial and tax consulting services."

Some of Ed's most memorable experiences in differentiating Hewins from banks and brokers include helping clients through the tough challenges associated with transitions. Whether helping a client transition from work to retirement, helping a surviving family with the personal and financial changes following the loss of a loved one, or helping a client through any of the family or business changes life throws at them, Ed enjoys supporting them to the next life stage. "That is a great feeling," he says.

Ed sees his role as a primary resource that the client can look to for personal needs – for planning, investment, estate or tax help.

"We say we're high on integrity and it's true. We believe in serving our clients' best interest whether that is through truly building well planned and managed portfolios or providing critical planning advice," Ed says.

He enjoys building close client relationships, too, inviting clients out to numerous outdoor activities. In his spare time, Ed also serves as a member of the Madison Estate Council and chairs the finance commission for his parish.

A Career in Financial Planning and Consulting

Senior Manager of Tax and Advanced Financial Planning Services, Clifton Gunderson, LLP; Financial Planning

"Getting through the clutter of financial services marketing is a challenge to the point of paralysis. People are hit with so much information, and conflicting information Objectivity, for example, is a term used by broker dealers and it's not true."

Manager in Financial Planning Solutions and Executive Services, PricewaterhouseCoopers, LLP; District Manager of Financial Planning Services and various positions with American Express Financial Advisors

Education

Master's of Science in Financial Planning, College of Financial Planning, Denver

Bachelor's of Business Administration, University of Wisconsin, Madison

Holds NASD Series 65 Licensure as a Registered Investment Advisor Representative

AEP® Certificant, National Association of Estate Planners & Councils

CFP® Certificant, Certified Financial Planner Board of Standards, Inc.

Holds Wisconsin Life and Health Insurances License for insurance consulting

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