Bio | NATE WENNER

Although Nate Wenner enjoyed his work as a CPA for a national firm, what drives him is the need to make a difference for people. He sees that difference in the confidence people have in their retirement plan or how they are saving for their children's educations.

The work of a financial planner often extends beyond the numbers and into the most personal aspects of people's lives. Nate said, "I once worked with a young widow of a physician. We talked for months through her grief and helped her focus on the most important thing in her world: her young sons. We were able to set up a financial plan focused on her and her family's future. We helped her sort through the various insurance policies and many details of her family's finances. We used a few Kleenex in those discussions."

In additional to helping set up a comprehensive financial plan during the "building phase" of a client's nest egg, Nate also works with many people on retirement income planning. His training as a CPA gives him a real advantage in understanding tax implications of various distributions and other estate or wealth planning issues.

Hewins Financial Advisors' Financial Planner and Investment Consultant Nate J. Wenner, CFP®, CPA, PFS, CIMA*, is a professional you can count on to deliver an objective financial roadmap based on your needs and values. Although Nate is rigorously educated on financial options and has nearly every relevant credential for his field, his most important work is developing the kind of relationship that makes a difference for you and your family. His listening skills, kind and thoughtful approach, and ability to ask the right questions make all the difference in your financial outcome.

Nate is an active volunteer at his children's schools. Committed to financial literacy, he speaks to high school students to prepare them to understand financial matters. He is President-Elect for the Financial Planning Association of Minnesota, a national committee volunteer for the American Institute of Certified Public Accountants, and was nominated as one of 2008's 40 Under 40 by the Minneapolis/St. Paul Business Journal.

"My role is listening and asking questions you might not have been asked in the past. I help you focus on what is most important in your life and help you structure your financial decisions accordingly. I am not selling anything and there is no hidden agenda."

A Career in Planning for Individuals and Families

Hewins Financial Advisors Personal Financial Planner and Investment Consultant; Financial Planner and CPA, Ernst & Young; Adjunct Faculty, Minnesota State University at Mankato, teaching financial planning; Finance Committee, St. Thomas the Apostle Church

Education

B.A. from the University of St. Thomas

Publications

Nate and his ideas have been featured or quoted in publications such as the Journal of Financial Planning, USA Today, Minneapolis Star Tribune, Financial Planning Magazine, Corporate Board Member, Christian Science Monitor, and Chippewa Valley Business Report. Some of his financial planning ideas were featured in the personal finance book, Tips From the Top, by Edie Milligan.

** Certified Financial Planner™, Certified Public Accountant, Personal Financial Specialist, and Certified Investment Management Analyst*

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