Strategic Wealth
PARTNERS
CELEBRATING 10 YEARS of SERVICE

2018 MEDIA KIT



Strategic	Create long-term strategic plans focused on your unique needs
Wealth	Preserve and prudently grow your hard-earned wealth
Partners	Collaborate with other professionals to help you achieve your goals

FEATURED IN

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MEMBER OF

FPA
FINANCIAL PLANNING ASSOCIATION

Financial Planning Association

NAPFA

The National Association of Personal Financial Advisors

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(224) 632-1600

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The Focus Partnership

A Leading Partnership of Independent, Fiduciary Wealth Management Firms

In 2014, we joined Focus Financial Partners. Focus provides superior access to best practices, resources and continuity planning for its partner firms.

Focus partner firms maintain their entrepreneurial independence, while they benefit from the synergies, scale, economics and best practices of the market leader.

FACTS

Name: Strategic Wealth Partners (SWP)

Type of Firm: Registered Investment Advisor

Year Founded: 2008

Founders: Neal Price & David Copeland

Assets under Advisement (AUA): $2.6+ billion[a]

Number of Clients: 578[a]

Typical Client Size: $2 million - $20 million

Compensation: Fee-Only

Number of Employees: 30[b]

[a]As of 1/2/2018
[b]As of 5/10/2018

"By nature, calling short-term market moves can be treacherous. It is more important to focus on what types of risks can be expected."

David Copeland | Principal & CIO

SERVICE OFFERINGS

We develop, implement and continuously manage a long-term financial plan based on our client's needs. Planning is prioritized and implemented over time, and typically results in collaboration with the client's other advisors.

Planning areas may include:

- Investment advisory
- Retirement
- Education funding
- Taxes
- Estate
- Philanthropy
- Insurance

"By learning everything we can about a client's situation, we are able to identify situations that need to be addressed and how they integrate with the client's financial plan. That's what makes the planning that we do extrodinarily valuable."

Neal Price | Principal

Would you like our help on a story?

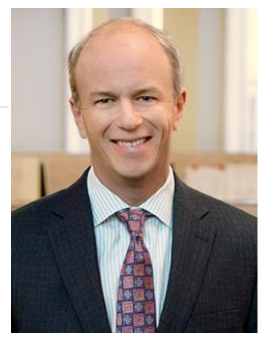
Our media contact can put you in touch with one of our professionals.

Gene Ullrich | **gullrich@tagteamglobal.com** | 312-342-3119

David Copeland, MBA | Principal & Chief Investment Officer

David offers expertise on story topics including:

- Asset allocation
- Alternative/private investments



Neal Price, CPA, MBA, CFA®, CFP® | Principal

Neal offers expertise on story topics including:

- Planning issues for business owners
- Tax planning

Moira Fahey-Ullrich, MBA | Principal & Chief Solutions Officer

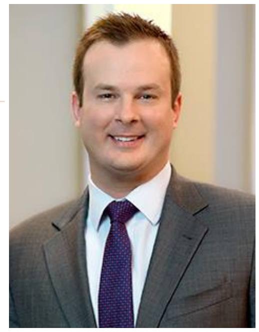
Moira offers expertise on story topics including:

- Compliance
- Technology & cybersecurity

Ashley Bebeau, CFP® | Wealth Advisor & Senior Financial Planner

Ashley offers expertise on story topics including:

- Retirement planning
- Divorce planning



Tom Buhrmann, CIMA®, MBA | Wealth Advisor

Tom offers expertise on story topics including:

- Behavioral finance
- Advising non-profits

Andrew Denenberg, CFP® | Wealth Advisor & Retirement Plan Advisor

Andrew offers expertise on story topics including:

- Advising retirement plan sponsors and participants
- High net worth client needs

Michael Karmin, CFA®, CFP® | Wealth Advisor

Michael offers expertise on story topics including:

- Generational planning issues
- College/education planning

Jill Kaz, CFP® | Financial Planner

Jill offers expertise on story topics including:

- Transitioning into retirement
- Tax Planning in retirement

Kathy Klein, CFP® | Wealth Advisor

Kathy offers expertise on story topics including:

- Advising suddenly-single women
- Investment needs of foundations

Marcie Nach, CFP®, MBA | Financial Planner

Marcie offers expertise on story topics including:

- Senior care resources
- Long term care insurance
- Social Security

William Perry, CFP®, CIMA® | Senior Wealth Advisor

William offers expertise on story topics including:

- Investment manager selection and portfolio construction
- Advising non-profits

Mark Weil | Wealth Advisor

Mark offers expertise on story topics including:

- Managing investment risk
- Goal setting

DOWNLOADS

Team Member Photos (high-resolution)

David Copeland

Neal Price

Moira Fahey-Ullrich

Ashley Bebeau

Tom Buhrmann

Andrew Denenberg

Michael Karmin

Jill Kaz

Kathy Klein

Marcie Nach

William Perry

Mark Weil

Firm Logos (high-resolution)

White Background_No Tagline

White Background_Full

White Background_10 Years of Service

Green Background_No Tagline

Green Background_Full

Green Background_10 Years of Service

LINKS

Bio – David Copeland

Bio - Neal Price

Bio – Moira Fahey-Ullrich

Bio – Ashley Bebeau

Bio – Andrew Denenberg

Bio – Michael Karmin

Bio – Jill Kaz

Bio – Kathy Klein

Bio – Marcie Nach

Bio – William Perry

Bio – Mark Weil

Date Published: 6.4.2018