Shakespeare Wealth Management 25th Anniversary

Press Release

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For Immediate Release

SHAKESPEARE WEALTH MANAGEMENT APPOINTS ANDREA BULEN, CFP®, AS PRESIDENT AND PARTNER, MARKING 25 YEARS OF EXCELLENCE

Pewaukee, WI - January 2nd, 2024 – Shakespeare Wealth Management, a fiduciary and fee-only financial planning firm, proudly announces the promotion of Andrea Bulen, CFP®, to President and Partner. This strategic move coincides with the celebration of the firm's 25th anniversary in 2024.

As Shakespeare Wealth Management continues its legacy, Andrea's promotion aligns seamlessly with the company's long-term growth plan of serving high-net-worth clients. Founder & CEO, Kevin Reardon, CFP®, expressed, "Andrea's evolving leadership and management role over the years have been pivotal in our success, and her appointment as President rightly acknowledges her significant contributions to the firm." Andrea will not only maintain her active involvement with clients but will also guide the firm towards new heights.

Andrea is a distinguished financial advisor, with exceptional abilities in creating and implementing financial plans for high-net-worth clients. Her unique approach involves getting to know each client and their story before identifying and prioritizing their financial goals. This personalized strategy enables her to plan for our clients' life milestones and shape their legacy.

Beyond her exceptional financial planning, Andrea's work ethic and leadership skills have proven instrumental in helping Shakespeare Wealth Management navigate volatile markets, new technologies and day-to-day challenges. Her role as president will benefit our clients for years to come.

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Andrea Bulen became a CERTIFIED FINANCIAL PLANNER™ **in 2009.** Actively engaged in the financial planning community, she is a proud member of the **Financial Planning Association (FPA),** the **National Association of Personal Financial Advisors (NAPFA),** and the Fee Only Network.

Residing in Merton, WI, with her husband and three children, Andrea invites inquiries and can be reached at Andrea@ShakespeareWM.com.

Join us in celebrating 25 years of financial excellence!

About Shakespeare Wealth Management

Shakespeare serves high-net-worth individuals and families with investable assets of $1 million or more. For 25 years, Shakespeare has been providing unbiased financial solutions as a fee-only, fiduciary financial planning firm. Our financial advisors have a deep, ongoing relationship with clients, which helps them to better understand and implement their financial objectives **because people matter.**

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