July Newsletter

Donohoe/Litka/Wenzel Group

We are excited to share the July edition of our newsletter. This issue is filled with valuable insights to help you navigate the year ahead. Please feel free to share it with anyone who may benefit, and reach out if you'd like to discuss any topics in more detail.

Welcome Lauren!

Lauren Wenzel, CIMA®

Financial Advisor
Financial Planning Specialist

Contact

We are thrilled to announce that our team is growing. After working with our team since last May, Lauren has stepped into the role of Financial Advisor.

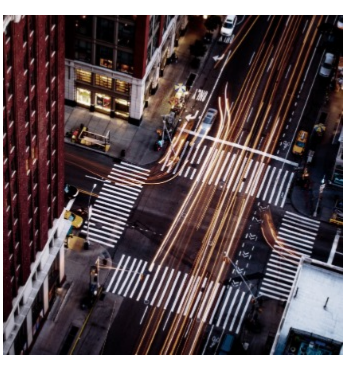
Lauren is passionate about building strong relationships with clients and helping them reach their goals. She works with affluent professionals, athletes, and business owners to help them build and preserve their assets. She is responsible for constructing and implementing in-depth strategic plans, market insight, risk management, and a disciplined investment process tailored to help meet each client's unique needs and career.

Lauren focuses on simplifying financial complexity so that clients can spend time on what matters most to them – family, career, and legacy.

Professionally, Lauren has earned the Certified Investment Management Analyst® (CIMA®) designation through the University of Chicago Booth's Executive Education Program; as well as her Financial Planning Specialist (FPS) designation. Lauren has a BBA from the University of Notre Dame's Mendoza College of Business. Outside of her studies, Lauren was a middle blocker for the University of Notre Dame's Women's Volleyball Team and a team representative on the Student-Athlete Advisory Committee (SAAC).

Her time as both a student-athlete at the University of Notre Dame and her future husband being an NFL Defensive-End allow her to have a deep, personal understanding of the unique needs and unpredictability of being a professional athlete, including: career length, unpredictable income, and pay-schedules. She works with athletes to help build customized, tax-efficient wealth strategies that can help support their goals during their career and well after.

Investor Resources



Making It to Draft Day: Financial Solutions for Prospective Pros

The journey to becoming a professional athlete is life-changing–and there are inherent challenges along the way.

Learn More

Investing in the 'Age of Aging'

The world is getting older. From tech-enabled "aging in place" services to multigenerational wealth transfer, discover the sectors poised to benefit from the rise of senior consumers.

Learn More

A Simple Six-Step Retirement Checkup

Periodically checking your retirement plan, especially during periods of market volatility, can help ensure you're on track to meet your goals.

Learn More

Finance & Wellbeing

Estate Planning Essentials: 7 Key Steps

Estate planning can be more complicated. Take a look at these seven steps to learn more.

Learn More

Tax-Smart Strategies for Selling Securities

Realizing profits may seem like the best part of investing, but taxes can add up too. Our analytics tool can help investors tap their portfolios in tax-savvy ways.

Learn More

The Team

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