Schaper, Benz & Wise
FAMILY WEALTH COUNSEL
Trusted Advisor for Generations

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Position Announcement

Schaper, Benz & Wise is seeking a highly qualified professional to join its Family Wealth Counsel division. This position will provide overall planning and wealth management assistance to clients of significant means.

Responsibilities, often carried out in partnership with the client's attorney, accountant, and investment advisor, will include:

- Planning for day-to-day cash needs and significant financial events, such as retirement;
- Developing and implementing gifting strategies for family and charity;
- Identifying and addressing income and transfer tax issues;
- Reviewing, interpreting, and implementing estate plans; and
- Providing guidance to clients serving as trustee, personal representative (executor), or other fiduciary roles.

Expertise in estate-planning, trust administration, and/or tax planning is strongly preferred. Excellent client service skills are a must.

Mentoring and training will be provided. The successful candidate may be invited to join the firm's ownership/leadership team after a reasonable period of time.

For additional information, contact Kim Petersen, 920-727-1137 or kpetersen@sbw-invest.com.

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Schaper, Benz & Wise is a registered investment advisor serving high net worth individuals throughout the Fox Valley and beyond. SBW's Family Wealth Counsel division assists select clients with their overall financial, tax, charitable, and wealth transfer plans.