

## **Business Filler: Melinda Wilke, Wealth Management Advisor, Northwestern Mutual**

By Karin L. White

Melinda Wilke began her career while still attending college. She was attending Marquette University in pursuit of a degree in Finance. In 1999, the University hired her as Director of Finance. Then in 2000-2002, while *still* in school, she was a Mutual Fund Accountant at Strong Funds. During her last semester at Marquette, she began an internship with Northwestern Mutual to learn the ropes of being a Financial Representative. "I graduated from Marquette in 2002, and went full time," Melinda says, "and now I am a Wealth Management Advisor offering fee-based planning with Northwestern Mutual."

Melinda's firm, Northwestern Mutual Hales Corners is in Hales Corners near the Boerner Botanical Gardens. She has been with Northwestern Mutual for 15 years. "I have one business partner," Melinda tells us. "Mike Slutzky has been a Disability Specialist for the last 35 years."

Their office boasts a well-trained and highly educated team who support the partners and help their insurance and investment clients. "Our firm helps provide generational holistic financial planning for specialist physicians and executives, to preserve their wealth and protects their families," reveals Melinda. "The best part about the business is getting to know our clients and their families, hearing what their goals are and what makes those goals so important to them. We get to be a part of the lives of each unique family we assist."

Because of all of the education it takes to sit in Melinda's place, she has many financial designations. Without attempting to define any of them, we will list the alphabet soup of designations as you might see them on her business card: CFP, CLU, ChFC, CASL, CLTL, CLF. She holds series 6, 7, 9, 10, 26, 63, and 65 FINRA registrations and is licensed to work with clients in 36 states. This year, she even earned the Advisor of the Year Award within her Network office for overall premium credit and product diversity. What an amazing set of accomplishments!

When we asked Melinda what drew her to this work, her answer was quite impassioned and very personal. "When I was 12 years old," she relates, "I used to help my dad complete his business tax returns and compile his company finances. I was interested in finance and taxes at a very young age, and I did get a lot of my business sense from my dad."

Melinda majored in Accounting in high school and then followed that with the aforementioned degree from Marquette. "My dad grew up on a farm in Southern Illinois, and acquired a good work ethic doing the hard work that was required there," Melinda asserts. "He made sure he passed that on to us. He believed in a college education for his children, and wanted us to have self-sufficiency and escape the kind of hardship he has had all his life."

Melinda's older brother, her parents' firstborn child, died at the age of only seven. "Because they had no health insurance at the time of his death," Melinda adds, "they struggled to raise the remaining four of us children. They fought hard to give us a safe home and get us through school, all the while keeping from us the fact of their struggle. Watching my parents go through that at such a young age gave me an appreciation for money and the importance of a family's being prepared. You never know what might happen."

She felt that, as hard as her father worked, it never seemed to be enough without a proper plan. "My team and I want to help our community and those families that want to be successful and prepared," she declares. "Starting in 2017, we are going to host quarterly educational seminars for the community. Our focus will be Retirement Distribution Planning, Social Security Strategies, Tax-Efficiencies for Retirement, and Women's Finances. These are the topics that we see most in our practice."

Melinda and her husband Ryan live with their son Reid, who is 3.5 years old, in Wyndham Ridge subdivision. Ryan is a Senior Project Manager at Industrial Roofing Services, and is a licensed professional engineer in Wisconsin, Illinois and Florida. The Wilkes love the neighbors and the relative safety of their location. "We both grew up in small towns, where people didn't have to lock their doors," Melinda declares. "We wanted that same, safe feeling for our son." They are very active with their neighbors, and recently hosted a sushi night and a fondue night. "The neighbors are like family," they report.

They are members of St. Alphonsus Church in Greendale, where Reid also attends Academy of Learning preschool. They are members of Tuckaway Country Club and volunteer at St. Alphonsus food pantry. The Wilkes also love Formula One Racing and Green Bay Packers and Michigan University football.

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