

Bio | BENJAMIN HAYES

Benjamin Hayes joined Wipfli Hewins in 2009 as an Associate Consultant and Certified Financial Planner™ practitioner. With a background in personal financial planning, he helps his clients prepare for future uncertainties in their financial lives, focusing on retirement and risk management considerations.

Benjamin works with his clients to develop and implement an investment management approach designed with their unique personal objectives in mind. He ensures that the management of investment assets works in concert with his client's financial plan. Benjamin also coordinates his financial planning recommendations with the client's accountant and estate planning attorney to provide a seamless, well thought-out strategy for meeting his client's goals.

"I often have individuals and families ask me for investment advice, but when we get to the meeting I quickly realize their entire financial situation is in disarray, and investment advice is far down the list of important action items. There is no greater satisfaction than working with a family and taking them step by step through the financial planning process. For the first time my clients understand what they should be doing and more importantly, why."

Throughout this planning process, Benjamin focuses on educating his clients about how behavioral biases and investor emotions impact total investment return. This education process provides clients the proper context for making well-informed decisions regarding their investment portfolios.

Prior to joining Wipfli Hewins, Benjamin worked for one year as a Financial Advisor in the insurance/brokerage industry and two years as a Financial Planning Assistant for a fee-only financial planning practice.

"I work with my clients so they can be proactive, not reactive. Instead of getting trapped by the highly emotional, short-term market ups and downs, I help them focus on what really matters to them and their family. We spend time on what we can control – planning/saving for retirement, disciplined investing and preparing for life's future uncertainties, whatever they may be."



While out of the office Benjamin enjoys attending sporting events and spending time with his family. Benjamin and his wife Kelly reside in Green Bay with their golden retriever.

Education

B.S. in Consumer Science – Personal Finance, University of Wisconsin – Madison

CFP® Certificant, Certified Financial Planner Board of Standards, Inc.

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