

Bio | JULIE NICHOLS

Julie Nichols, CPA, PFS worked as a manager in the tax department for Wipfli CPAs and Consultants for 10 years before joining the financial advisors of Hewins Financial Advisors in 2001. She uses her background in accounting to field tax questions for her clients as well as advise on personal wealth management. She also works with small businesses to help them manage 401(k) and other retirement plans and to educate employees on smart investing.

Working in the same offices as Wipfli CPAs, Julie can consult with them on mutual clients to provide streamlined planning and financial advice. Although her clients can choose any accounting firm, the partnership is a value-added option for Wipfli clients.

“I like the objectivity and the fee-only structure at Hewins. It’s similar to hiring an accountant,” Julie says. “There are no hidden fees or compensation and no reason to give our clients anything but the best advice.”

Julie has also built strong professional relationships in the areas of insurance and business development and has spoken to groups about college planning vehicles. She is a Personal Financial Specialist (PFS) and is currently pursuing her Certified Financial Planner (CFP)[®] designation. She is a member of the American Institute of Certified Public Accountants (AICPA) and the Wisconsin Institute of Certified Public Accountants (WICPA).

Hewins has also afforded Julie the flexibility to raise her two young sons and spend time with her husband, noting that the family friendly atmosphere extends to all employees and has helped retain other experienced professionals like herself.

“I’ve been working with Wipfli for 16 years, the last six with Hewins,” Julie says. “It’s been a good transition.”

“My accounting background has translated well to financial planning and wealth management services. The partnership between Wipfli CPAs and Hewins created opportunities for me to work in a more personal capacity to help people manage their financial life.”



A Career in Accounting and Financial Planning

Manager for Wipfli LLP for 10 years in the tax compliance department, providing individual and business tax services and financial planning; Tax department staff at Scribner, Cohen & Co for two years, preparing individual and trust tax returns

Education

B.B.A. from the University of Wisconsin, Milwaukee
AICPA Personal Financial Specialist

Contact Julie

Consultant/Financial Planner
414-431-9347
jnichols@wipflihewins.com

WIPFLI

HEWINS

Investment Advisors LLC

www.wipflihewins.com