

Bio | KARL SCHWARTZ

Karl Schwartz, CPA, worked as a tax accountant for Wipfli LLP for nearly 4 years before joining Wipfli Hewins Investment Advisors in 2008 as an Associate Consultant. Karl attributes his prior experience in taxation with a CPA firm as a solid foundation and stepping stone to his new broader role as financial advisor. With a primary focus on individuals, Karl spends nearly every day taking clients and prospective clients through the firm's VIP (Visual Interactive Planning) experience.

"I started working when I was 14, and haven't stopped since. In every job I've ever had, I dedicated myself to doing what mattered. During summers in high school, while putting myself through college and after graduation, the work I did gave those I served something they needed, and wouldn't have had without me."

Karl credits lessons learned from his varied work experiences as the driver for his initial career choice as a CPA. "Attention to detail, daily discipline and the power of positive communication are learned behaviors. Learning them early in life made it possible to bring them to my first professional opportunity," he notes. Karl also credits his teenage and young adult work experiences as one of the primary causes for his heightened awareness of how most adults attach both importance and sensitivity to any discussions about money.

"My passion is to help simplify the unnecessary financial complexities in clients' lives, and to help them to realize, plan for, and achieve their life-long dreams."



A Career in Accounting and Financial Planning

Senior Tax Accountant for Wipfli LLP for 4 years; providing tax preparation services for businesses and individuals, tax planning, and litigation support

Education

B.S. in Accounting from the University of Wisconsin – La Crosse

Contact Karl

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