

Bio | PAT BRAULT

When you work with Patrick W. Brault, CPA, you work with both a disciplined process and a person who cares deeply about your values and needs. “The first thing I do is work through step one of our process to deeply understand a new client,” he says. “Most people do not spend a lot of time thinking about their long-range goals and how comfortable they really are with risk. However, I use this information to support clients with important life choices.”

With years of experience in bank trust departments, Pat works with individuals, families, educational institutions, foundations and endowments to create clear and transparent long-term investment strategies.

“Institutions are more financially focused than most families, but they have the same concerns. Most boards have relationships with several people in the community, but they must maintain above-board practices. If they do not meet this requirement, they often end up forming investments with many different groups and an exceedingly complex management process. My job is to clarify relationships and help avoid any conflicts of interest.”

Pat also brings financial wellness seminars to help organizations provide objective financial education and promote healthy financial lives for their employees.

Originally from Green Bay, WI, strong relationships in communities are the hallmark of Pat’s work. He and his wife have raised their three daughters in several towns in both Minnesota and Wisconsin while he developed his knowledge and skills. He has worked with clients long enough to comprehend the value of his work in these communities. “That,” says Pat, “is the real payoff. I like to see people have success in their lives from planning early.”

“I have been working in financial services and banking since the late 70s. Hewins Financial Advisors gives me the opportunity to fulfill all of my ambitions: build relationships and connections with people, and, in a highly ethical way, add value to their lives.”



A Career in Planning for Families and Institutions

Hewins launch with Wipfli CPAs; US Bank Trust; Valley Bank / M&I Bank Trust Department

Education

B.B.A. from St. Norbert’s College in DePere, WI

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