Andrea Bulen, CFP®, Named Partner of Shakespeare Wealth Management, LLC

Wisconsin, Brookfield, Oct 12, 2021 (Issuewire.com) - ANDREA BULEN, CFP®, NAMED PARTNER OF SHAKESPEARE WEALTH MANAGEMENT, LLC

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SHAKESPEARE WEALTH MANAGEMENT, a fiduciary, fee-only financial planning firm based in Pewaukee, Wisconsin, is pleased to announce the promotion of Andrea Bulen, CFP®, to the position of Partner with the firm.

“Andrea’s work ethic, communication skills, and strong values have been invaluable to me, to the firm, and to our clients. I want to personally thank her for her efforts, her insights, and her feedback in helping us navigate through volatile markets, new technologies, day-to-day challenges, and the wonderful growing pains we have experienced over the years. Her continued leadership will help our clients for years to come,” said Kevin Reardon, the firm’s President.

Shakespeare is delighted to have Andrea become a Partner with the firm. She has shown herself to be an accomplished financial advisor, with exceptional abilities in planning for our high net-worth clients. Andrea gets to know each of our clients and their story before identifying and prioritizing their financial goals. This intimate process allows her to plan for our clients’ every life adventure, as well as for their future legacy.

Andrea received her **Master’s degree** from the **University of Minnesota** and earned her CFP® **designation in 2009.** She is an active member of the **Financial Planning Association (FPA),** the **National Association of Personal Financial Advisors (NAPFA),** and the Fee-Only Network.

Andrea lives in Merton, WI with her husband and 3 children.

She can be reached at Andrea@ShakespeareWM.com.

About Shakespeare Wealth Management, LLC: Shakespeare Wealth Management serves high net-worth individuals with investable assets of $1,000,000 or more, who are looking for a strong, lasting relationship with their advisor. With over 84 years of combined experience, Shakespeare provides unbiased financial solutions, serving as a fiduciary to all clients, operating under a fee-only model to keep advice pure. Shakespeare is the financial quarterback for family matters like cash flow, debt management, retirement, paying for college, charitable intentions, taxes, investments, inheritance, and more. Shakespeare clients have an ongoing relationship with a firm that understands their financial objectives and how they fit in the context of their own families, their values, and their life goals. For more information, visit www.ShakespeareWM.com.

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