

In this newsletter we have some exciting team updates to share with you!

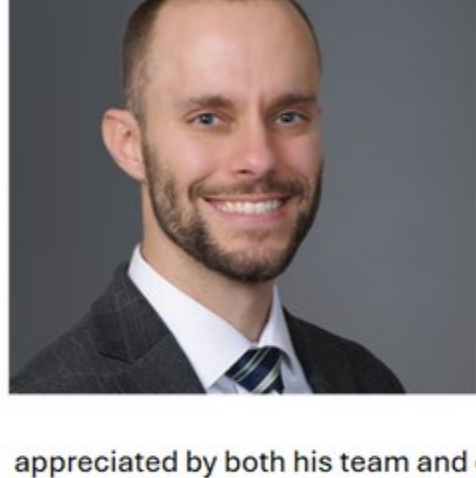
We'll also be diving into essential topics to help you navigate the complexities of today's headlines and hot topics, including new insights from Wealth Enhancement about next generation estate planning and charitable giving.

In addition, we've included a feature video from our YouTube channel, "The history of market returns and Fed rate cuts." As always, if you have any questions, our team is here to help.

Know someone who might benefit from our service? We'd love to connect! [Click here to refer them](#). Your recommendation means a lot to us!

Team UPDATES

Employee Spotlight:



Jay Neary Promoted to VP Financial Advisor

We are delighted to announce the promotion of Jay Neary to Vice President, Financial Advisor. Since joining the Hansen Team in 2014, Jay has demonstrated a genuine passion for assisting clients in reaching their financial objectives.

His thoughtful approach to account management and client relations is widely appreciated by both his team and clients alike. Beyond his client work, Jay has embraced various opportunities to educate the broader community on the significance of financial planning and investing.

Notably, he has conducted seminars for cancer patients at Froedtert Hospital and is in the process of launching an innovative video series, "Start Your Day With Jay," aimed at engaging the next generation of investors. Please join us in congratulating Jay on this well-deserved advancement in his career.

New to Our Team:

The Hansen Team is excited to announce the addition of several talented and experienced Financial Advisors.



Welcome Merissa McCuen CFP®

Please join us in welcoming Merissa McCuen, CFP®, who recently joined our team as a Financial Advisor. Merissa collaborates with individuals, business owners, and multi-generational families, offering trusted guidance to complex financial scenarios.

Known for her open communication, Merissa ensures clients feel heard and prioritized. With over 10 years of wealth management experience, she helps clients achieve meaningful goals while simplifying personal wealth management. Her expertise includes trust and estate planning, investing, and tax efficiency. Outside of work, Merissa enjoys nature, traveling, trying new restaurants, and spending summer days on Okauchee Lake with her fiancé, Derek. Merissa can be reached at mmccuen@wealthenhancement.com or 262-316-7723.



Welcome Amanda Sachs CFP®, ChFC®, CLU®

We are also pleased to introduce Amanda Sachs, who has joined the Hansen Team as a Financial Advisor. Amanda brings over a decade of financial planning experience and carries the esteemed designations of CFP®, ChFC®, and CLU®. She is driven by a passion for helping families navigate their financial futures.

Amanda's goal is to empower others to achieve their financial aspirations while maintaining a healthy work-life balance. We are thrilled to have such a committed and experienced planner on board to support our clients in reaching their financial goals.

Outside of work, she enjoys a vibrant life with her husband and three children, and two adorable Maltipoo dogs. In her personal time, she enjoys exploring the outdoors and fostering strong community connections. Amanda can be reached at asachs@wealthenhancement.com or 262-923-5108.



Welcome Jake Perocheschi

Last but not least, we are happy to welcome Jake Perocheschi, a seasoned professional in the financial industry with an impressive 25-year track record, including 20 years at Charles Schwab. Jake is well-versed in comprehensive financial planning and asset management, particularly with high-net-worth clients. His passion lies in delivering exceptional financial advice to help individuals achieve their financial goals.

Jake resides in East Troy with his wife, Jessica, and their two daughters, Isabella and Grace. As a devoted family man, he takes great pleasure in watching his daughters excel in basketball, softball, and football. Jake has shown his commitment to the community by serving over a decade on the East Troy Volunteer Fire Department. Additionally, he is an avid outdoorsman who enjoys hunting and fishing, especially during the picturesque Wisconsin winters. Jake can be reached at jperocheschi@wealthenhancement.com or 262-283-5322.

Community Outreach:

Several members of the Hansen Team dedicated another afternoon to supporting Feeding America.



Feeding America

This organization, which collaborates with local partners, community leaders, and pantries, depends on volunteers to help distribute essential items to underserved individuals and households.

Members of the Hansen Team sorted and boxed non-perishable food items into boxes that eventually would be delivered to local food pantries. During the two and half hour shift, the team of volunteers packed 7,040 pounds of food which equates to 5,866 meals!



[Learn more about Feeding America Here.](#)

Happy Thanksgiving!



From all of us on the Hansen Team, we want to wish you and your loved ones a Happy Thanksgiving.



November 2024 Market Commentary | Wealth Enhancement

Global equity and fixed income markets retreated in October, reflecting the uncertainty of policy implications...

[Learn More](#)



Financial Planning for Parents With Adult Children

Learn how and why to include your adult children in financial planning discussions.

[Get conversation starting tips](#)



Charitable Giving Strategies That Maximize Tax Efficiency

Charitable giving is a powerful way to create a lasting legacy while also reducing your tax burden.

RESOURCES:

[Charitable Giving & Estate Planning](#)

[Charitable Remainder Trusts](#)

[Key rules for charitable giving](#)

[Read more from our Blog](#)



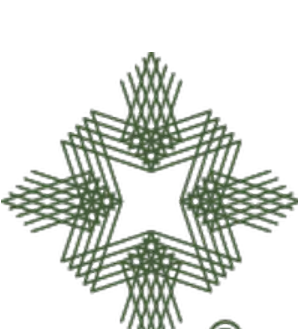
New on YouTube: History of Market Returns & Fed Rate Cuts

October 2024 - Why the Fed is now turning their attention to the labor market.

[Watch the Video](#)

Thank you! Your trust and confidence have been instrumental in our success. We are truly grateful for your continued partnership.

Thank you for reading our newsletter. Please reach out to our team if you have any questions, comments, or concerns.



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