

Our Key Moments

- 1992** Paula opens the firm as a sole proprietor. At that time, taking a comprehensive approach, using low-cost index funds, and operating within a fee-only business model were distinguishing features in a financial planning industry just beginning to separate itself from traditional sales-driven investment services.
- 1994** Paula publishes [Portfolio Theory Creates New Investment Opportunities](#) in the Journal of Financial planning making the case for using modern investment principles when advising individual investors and [Money and Kids: A Parental Guide to Teaching Financial Responsibility](#) in the AAll Journal, an article foreshadowing the great emphasis placed today on teaching financial literacy.
- 1995** Paula completes a five-year term as president of AAll-Wisconsin.
- 1997** NAPFA Advisor publishes Paula's article [Planning Perspectives: Generation X](#), detailing how Gen Xers face different life challenges and therefore different financial planning needs.
- 1998** Medical Economics Magazine names Paula as one of the country's best financial advisors for doctors for the first of multiple years.
- 2001** Mutual Fund Magazine names Paula to its national list of top financial planners.
- 2002** Paula receives the Robert J. Underwood Award for her substantial contributions to [NAPFA](#) and to the financial advisory profession.
- 2004** Paula moderates [The Great Debate](#) between Zvi Bodie and Jeremy Siegel at the NAPFA National Conference in which Jeremy Siegel agrees with Zvi Bodie that inflation-indexed lifetime income annuities are the go-to asset class for your base level of income in retirement.
- Assets under management reach \$50 million.
- 2005** Paula and Zvi Bodie publish [For Long-Term Investors the Focus Should be on Risk](#) in the AAll Journal detailing a more sophisticated view of how to think about personal investment risk.
- Paula and one of our interns co-author [The College Planning Smorgasbord](#) for the Financial Planning Journal.

Bloomberg Wealth Manager identifies our firm as one of the nation's top advisory firms for four years in a row starting in 2005.

- 2006** Assets under management reach \$100 million.
- 2007** Paula publishes [Life-Cycle Investing is Rolling Our Way](#) in the Journal of Financial Planning summarizing the paradigm shift for financial planning advocated by economists Zvi Bodie and Nobel Laureate Robert Merton in their 2003 Financial Analyst Journal articles, a paradigm shift adopted by our firm as a result of their teachings and mentorship.
- 2008** Paula is named for three years in a row by Bloomberg Wealth Manager/AdvisorOne in its national list of the "Top 50 Women in Wealth".
- 2012** Paula publishes [A Look From the Outside In](#) in the Financial Planning Journal, laying out our view of financial planning and in particular how we combine the tenets of life-cycle planning with concierge-like personal attention and service.
- 2013** Our firm's philosophy is featured in a [cover story of Research Magazine](#) detailing how we have incorporated life-cycle theory into our advisory practice.

Two academic articles co-authored by Paula are published:

[Public Policy and Consumer Disclosure for the Income Annuity Market](#) (The John Marshal Law Review), advocating for fair investment markets for consumers, and

[Explaining Risk to Clients: An Advisor Perspective](#) (Oxford University Press), tracing the evolution of financial planning theory and practice and thus contributing to the ongoing conversation between practitioners and academics.

- 2016** Assets under management reach \$200 million.

A multi-year internal initiative to gradually shift from a sole-proprietorship to a multi-advisor firm becomes more visible to the outside world.
- 2017** Clint R. Wondra CFP®, CPA/PFS becomes a shareholder and Chief Operating Officer.

Assets under management surpass \$250 million.
- 2019** Hogan Financial sells its advisory practice to Creative Planning, Inc. on December 20, 2019.

Assets under management surpass \$290 million.