

# HEATHER DEATON, CFP®, CSRIC™

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Wealth Advisor, Ellenbecker Investment Group

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## CONTACT

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## PROFILE

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Passionate, authentic, relationship-focused, wealth advisor with a passion for sustainability and social and environmental justice. Consistent and accomplished volunteer and board member for various organizations in Wauwatosa community and greater Milwaukee area. Eager for an opportunity to enhance and drive forward sustainability projects and ideas, bring ideas and action plans to citizens and government committees. Enthusiastic to make a difference in my community.

## DESIGNATIONS & AWARDS

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Certified Financial Planner, CFP®

Certified Social Responsible  
Investment Counselor, CSRIC™

Corporate Volunteer of the Year,  
2023, BizTimes Media

## EDUCATION

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University of Wisconsin – Eau  
Claire, 1992  
Bachelor of Arts, Economics

## RELEVANT/RECENT EXPERIENCE

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*Ellenbecker Investment Group, Pewaukee, WI*  
Wealth Advisor

### **2016-Present**

*Fondy Food Center, Milwaukee, WI*  
President, Board of Directors

### **2017-Present**

*Tosa Green Summit, Wauwatosa, WI*  
Planning Volunteer and Presenter/Table Host

### **2021-Present**

*St Matthew's Lutheran Church, Wauwatosa, WI*  
Stephen Minister, Sunday School teacher, Meal Ministry  
coordinator, International Mission Trip participant

### **2007-Present**

*Lutheran Campus Ministry, Milwaukee, WI*  
Treasurer, Board of Directors

### **2019-2022**

*Northwestern Mutual, Milwaukee, WI*  
Project Manager

### **2005-2016**