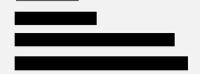
# HEATHER DEATON, CFP®, CSRIC™

# Wealth Advisor, Ellenbecker Investment Group

#### CONTACT



#### **PROFILE**

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**

Certified Financial Planner, CFP®

Certified Social Responsible
Investment Counselor, CSRIC™

Corporate Volunteer of the Year, 2023, BizTimes Media

### **EDUCATION**

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

## **RELEVANT/RECENT EXPERIENCE**

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