



ADVISOR INSIGHT

Fall 2026 Financial Checklist

School is back in session, the nights are a little cooler, and football is in action! Fall in Wisconsin is personally my favorite time of the year. It is also an ideal time for a proactive financial planning window. The final months of the year provide valuable opportunities to manage taxable income through distribution planning, Roth conversion analysis, retirement contributions, tax-loss harvesting, and charitable giving.

Most households fall into the trap of thinking about taxes when it is time to file in the Spring. The WHG advisory team is here to coordinate your accounts and investment strategies to match the opportunities while there is still time to act.



Featured Advisor
Jon Storing, CFP®

AROUND THE OFFICE

You may notice a few changes



Our new look out front

Our new address numbers have been added to the front of the building.



The new sign is up

Our new building sign is now in place.



Progress continues

Another step in continued updates around our Menomonie office.

TEAM MILESTONES

Katie Larsen
1 Year



Celebrating Katie's first year supporting John Heike and the advisory team as a client service associate.

Brennan Anderson
1 Year



Celebrating one year with WHG, and Brennan's Growth from intern to Registered Assistant.

Jon Storing
Certified Financial Planner®

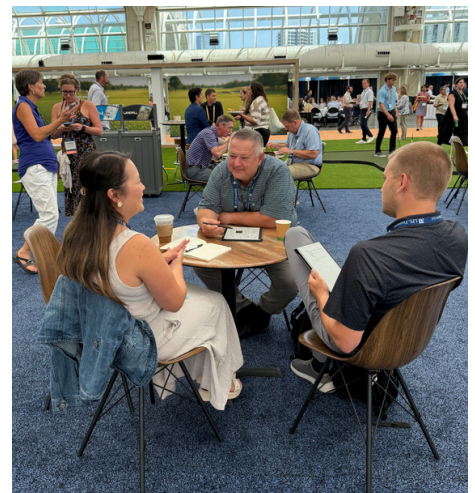
Congratulations to Jon on earning the Certified Financial Planner® certification.

LEARNING & GROWING

WHG Attends LPL FOCUS 2026

Members of our team recently attended LPL FOCUS 2026, spending time learning, exchanging ideas and connecting with others across the LPL community. The conference gave us an opportunity to step outside of the day-to-day, explore new perspectives and bring home ideas we can put to work for our clients and our firm.

It was also valuable time together as a team to reflect on how we continue improving the way we serve, communicate and grow as WHG.





A Summer on the Course

It wouldn't be summer in Wisconsin without a few golf outings. Along with hosting our own Women's Golf Outing, WHG was proud to support several community golf events throughout the season.

While our scores may not always be worth sharing, the causes certainly are.



ONE LAST LOOK BACK

22nd Annual Women's Golf Outing

Rain may have changed the day, but it did not change the impact. Together, attendees raised \$6,126, and with WHG's match, the outing generated \$12,252 for local organizations.

Waznik Heike Group donated an additional \$1,000 to each nonprofit represented at this year's outing

SAVE THE DATE

JUNE 02, 2027

23rd Annual Women's Golf Outing

MILESTONE HIGHLIGHT

Celebrating One Year *at 2919*

We celebrated the one-year anniversary of our Menomonie office at 2919 Schneider Ave SE with a ribbon cutting alongside TruNorth Tax & Accounting and Mediquest.

This office has become a place for conversations, collaboration, planning and serving our clients and community.

Thank you to our team, clients, community partners and everyone who joined us in celebrating this milestone. We are grateful to call 2919 home and look forward to what's ahead.



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