

Newsletter



Thank you..

This past year has been one of meaningful change for Waznik Heike Group, and through it all, your trust has been our constant. Transitions, especially one as significant as a broker-dealer change, require patience, understanding, and confidence in the people guiding your financial future. We do not take that lightly.



Your willingness to stay with us, ask thoughtful questions, and move forward together speaks volumes about the relationship we share, and we are profoundly grateful for the faith you place in our team. Because of you, we were able to make changes that strengthen our ability to serve you—enhancing resources, expanding capabilities, and positioning our firm for the future with even greater independence and care. Your loyalty is not simply appreciated; it is the foundation of everything we do. Thank you for allowing Waznik Heike Group to continue earning your trust every day. We remain deeply honored to be your partner, and we look forward to many more years of helping you protect what matters most and plan confidently for what lies ahead.

Inside this issue:

Message from Our Partners

2026 Event Schedule

Waznik Heike Group's
Commitment to Community

Important tax information

Market Conversation

2025 In Review

Commitment to Community
Welcoming New Faces
Investing in Our People
Growing Our Footprint



Save the Date

WAZNIK HEIKE GROUP EVENTS

2026



January

WHG Client Appreciation Event
(January 29, 2026)

February

Menomonie Free Clinic Dinner
(February 14, 2026)

March

Lions Club Checkered Flag Banquet
(March 27, 2026)

April

Rotary Fest
(April 18, 2026)

Business After Hours
(April 20, 2026)

UW STOUT Athletic Honors Night -
WHG Humanitarian Award
(April 29, 2026)

May

Hayward Foundation for Educational Enrichment
Golf Outing
(May 15, 2026)

WHG Philanthropy Event
(May 19, 2026)

Menomonie Chamber Annual Awards
(May 21, 2026)

June

WHG Women's Golf Outing
(June 17, 2026)

July

Hands for Hospice Golf Outing
Durand Fishing Contest

August

Durand Basketball Association Golf Outing

Durand Veterans Golf Outing

Blues on the Chippewa
(August 6-8, 2026)

Menomonie Chamber Golf Outing
(August 15, 2026)

Sadistic Century
(August 15, 2026)

September

Educational Foundation of Birchwood
Golf Outing

November

Community Foundation
Jeans and Jewels Gala

December

Wakanda Wonderland



TAX INFORMATION YOU SHOULD KNOW

As a result of our recent broker-dealer transition, some clients will receive tax forms from **both Osaic and LPL Financial this year**. These documents are equally important and should be kept together for your records and provided to your tax professional when preparing your return. Each firm was responsible for reporting activity that occurred while your accounts were held there, which is why you may see statements from more than one institution.

Please note that Waznik Heike Group will not have access to copies of your Osaic-issued tax forms, making it essential that you retain those documents for your files. If you have questions about what you receive from LPL, our team is always happy to help guide you, but safeguarding both sets of forms will ensure your tax reporting is complete and accurate. As always, we appreciate your diligence and your partnership as we continue to navigate this new chapter together.



Finish 2025 Strong, Step Powerfully Into 2026

Every year leaves a trail of numbers behind—evidence of choices, effort, and focus. Each contribution, payment, and investment of your resources becomes part of a much bigger picture: the story of how daily discipline transforms into lasting progress. Steady, thoughtful action has a quiet brilliance that can compound over time.

This final stretch of the year can be a strategic one financially. While visions of sugar plums dance in some heads, many people are finalizing contributions, completing charitable gifts, reviewing coverage, and ensuring financial strategies still align with goals for the future. You don't have to go it alone – I can help you save time, close loops and set the stage for a confident start to a new year while feeling strong about your performance in this one. And as you envision what 2026 will bring, remember: small, deliberate steps taken day by day, week by week, are what form the path to extraordinary success. You've got this. A new beginning lies just ahead.



Recap of 2025



A Year of Growth and Community Impact

2025 was a year that reflected what matters most to us. Our clients and our community. One of the highlights was the 21st Annual Women's Golf Outing, which once again brought people together for a great cause and raised meaningful funds for local charities. We are continually inspired by the generosity of our clients and partners who show up year after year to make a difference close to home.

Funds Raised

\$95,671.24

Organizations Supported

Arbor Place

Bikers against child abuse (BACA)

Bridge to Hope

Dunn County Historical Society

Dunn County Humane Society

Junior Achievement

Leukemia & Lymphoma Society

Let's Go Fishing

Mabel Tainter Theatre

Menomonie HS Band Boosters

Menomonie Public Library

Northwest WI Homecare (Hospice)

Stepping Stones & InterFaith Volunteers

The Foster Closet

Save the date

WHG Women's Golf Outing 2026

June 17, 2026
@Tangelwood Greens



COMMITTED TO COMMUNITY

Amanda Geissler Memorial Foundation
American Legion Post 181
Birchwood Education Foundation
Birchwood Education Foundation Golf
Blues on the Chippewa
Bridge to Hope
Chippewa Falls Youth Baseball
Community Foundation of Dunn
County
Dunn County Humane Society
Durand Funfest
Durand Sports
Elk Mound Youth Baseball
Friends of Menomonie Recreation
Hands For Hospice
Hayward Education Foundation
Jeans and Jewels
Landmark Conservancy
Mabel Tainter Theater
Menomonie Area Chamber of
Commerce
Menomonie Free Clinic
Menomonie Hockey
Menomonie Lions Bowling
Menomonie Lions Checkered Flag
Menomonie Sports
Menomonie Sunrise Charitable
Foundation
Menomonie Sunrise Rotary
Options for Women

Rice Lake Chamber of
Commerce
Rotary Club Roses
Rotary Fest
Rylee Sabelko
Sadistic Century
Sleep in Heavenly Peace
St. Joseph Parish
Stepping Stones
UW Stout Blue Devil Fund
UW Stout Humanitarian
Award
Wakanda Wonderland
Woody's Walleye Service

Employee Impact
Amery Music on the River
Arkansaw Fur Fish and Game
Chippewa Falls Community
Foundation
Chippewa Falls Youth
Baseball
Chippewa Valley Youth
Football
Durand Basketball
Association Golf Outing
Durand Education
Foundation
Durand Education
Leadership Foundation
Durand Fishing Contest

Durand Fire and Rescue
Durand Junior Achievement
Durand Veterans Golf
Outing
Eau Claire North High School
Sports
Elk Mound Youth Baseball
Fellowship of Christian Athletes
Fellowship of Christian Athletes
Jacobs Well
Menomonie Boys Baseball
Menomonie Junior Achievement
Menomonie Wrestling
Miracle League of the Chippewa
Valley
NUIC Parish
Options for Women
Options for Women Golf Event
REACH Inc, Eau Claire
Trinity Lutheran Church of
Garfield
UW Stout Women's Basketball
Upper Midwest Great Dane
Rescue

STAY IN TOUCH WITH US!

Welcoming New Faces to Serve You Better



Sara Stumpf

Office Manager
Sara@whgfinancial.com



Betty Vang

Executive Assistant
Betty@whgfinancial.com



Katie Larsen

Executive Assistant
Katie@whgfinancial.com



Hannah Brommer

Client Relations Manager
Hannah@whgfinancial.com

This year, we were proud to expand our team with talented professionals dedicated to delivering exceptional service. We welcomed Katie and Betty as Executive Assistants and Sara as our new Office Manager. Hannah joined us as Client Relations Manager, further enhancing the personal attention our clients receive. Each bringing experience, care, and organization that strengthen the client experience every day. Their support behind the scenes allows our advisors to remain focused on what matters most: you.

Expanding Our Advisory Team



Sam Ferch

Menomonie
Sam@whgfinancial.com



Steve Helling

Eau Claire
Steve@whgfinancial.com



Gene LaRock

Eau Claire
Gene@whgfinancial.com

We also added depth and expertise to our advisory group with the arrival of Sam as a Financial Representative, along with Gene LaRock and Steve Helling as Financial Advisors. These additions reflect our commitment to thoughtful growth and ensuring you always have access to knowledgeable professionals who understand your goals.

Investing in Our People



Amanda Giesen

Client Service Associate
Amanda@whgfinancial.com

Professional development remained a priority in 2025, and we are thrilled to share that Amanda Giesen and Macayla Thompson both passed their Series 7 exams and are one step closer to financial representatives.

Their dedication to continuing education and client service strengthens our entire firm and ensures we remain well-positioned to support your financial needs.



Macayla Thompson

Client Service Associate
Macayla@whgfinancial.com



Brennan Anderson

Intern
Brennan@whgfinancial.com

Our internship program continues to be a point of pride for us. Last year, we were fortunate to work alongside two outstanding interns who have since committed to joining our team full-time.

We are excited to welcome two new interns who are eager to learn, grow, and contribute to the meaningful work we do with clients like you.



Mya Gerlach

Intern
Mya@whgfinancial.com

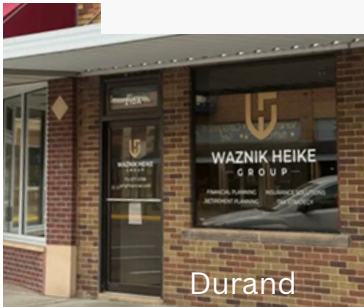


Menomonie Client Service Team - Client Appreciation Event 2025-2026

Growing Our Footprint



In 2025, we expanded our regional presence by opening a new location in Eau Claire and unveiling a newly refreshed office space in Menomonie. These updates reflect our continued commitment to serving and investing in the communities we call home. Our Menomonie office partners with TruNorth and Mediquest to support all aspects of our clients financial well-being.



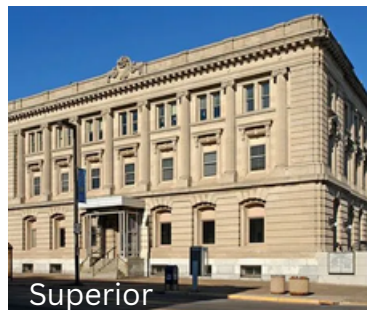
Durand



Eau Claire



Rice Lake



Superior



What financial goal are you most focused on in 2026?

☐ **Growth** ☐ **Protection** ☐ **Retirement Income** ☐ **Debt Reduction**

Let us know!