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**Lori Baumann**

Vice President, Financial Advisor

Robert W. Baird & Co.

 *Recognized as a* [***FIVE-STAR Best in Client Satisfaction Wealth Manager***](http://www.rwbaird.com/fi/5-star-disclosure.aspx)*2014*

*Served on the Chamber’s Board of Directors from 2005-2009.*

 

 **The Baumann, Braun & Layne Group**

 Pictured L-R: Lori Baumann, Tony Braun

**The Baumann, Braun and Layne Group** have a proud history of offering a comprehensive approach to financial planning. We help you meet your life goals through the proper management of your resources. From buying a home, saving for your child's education, planning for retirement, or leaving a legacy. We pursue deep and long-lasting relationships with clients and will work with you one-on-one to understand your financial situation and offer tailored solutions to address your individual needs. We know that every dream is unique and deserves a personal plan.

* Our clients rely on us for clear, decisive advice and recommendation based on an asset allocation strategy aligned to their objectives.
* We use a diversified approach to investing using a range of investment types such as individual stocks and bonds, mutual funds, exchange traded funds, cash alternatives, managed portfolio solutions. We have access to alternative investments and outside money managers.
* We offer analysis of current insurance coverage, investments, tax strategies, and estate plans.
* **Retire confidently.** We will help you plan for an income flow that will cover your lifestyle and essential expenses during retirement. As well as plan for the unexpected during retirement so you can leave the legacy you want.
* **Multi-Generational services.** We help our clients "start the conversation" and assist with education and wealth transfer to the next generation.

Specifically our clients know us for keen investment management, service excellence, strong communication, clear advice and unwavering commitment to their goals. We provide our Team's insight and strategy to clients, monthly or as a market news may warrant, in our email communication *"Our Message to Clients"*.

***A trusting partnership for your financial future, and for generations to come.***

Most of our new business is by referral. Our introduction meeting is complimentary.

*To reach Lori Baumann directly: 262-523-5676,* *lbaumann@rwbaird.com* *or* [contact us](http://bairdfinancialadvisor.com/baumannbraunlaynegroup/contact.htm) today.

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Consideration for inclusion in The FIVE STAR: Best in Client Satisfaction Wealth Manager Program includes an analysis of consumers’ responses to a client satisfaction survey. Only wealth managers with five years of experience in the financial services industry are considered. Additionally, the wealth managers who have made the list are required to certify that their license(s) has never been suspended or revoked by a regulating authority (e.g. FINRA or other regulatory agency) and that they have not had more than three customer complaints filed against them with a regulating authority where at least one complaint resulted in a settlement payment by them.
The inclusion of a wealth manager on the FIVE STAR Wealth Manager list should not be construed as an endorsement of the wealth manager by Crescendo Business Services nor should it be inferred that the consumer responses used from the survey represent the experience of all clients. Past performance does not guarantee future success.

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