

## Free CE Day – July 22, 2026

### 8:30 – Jamie Barwin & George Peek – von Briesen Roper

#### Title: **Wisconsin Probate Basics for Financial Advisors**

When a client dies, financial advisors are often the first call, before the family contacts an attorney, before probate is opened, and before anyone fully understands what comes next. This session, presented by attorneys Jamie B. Barwin and George S. Peek of von Briesen & Roper, s.c., gives financial advisors a practical, plain-language guide to Wisconsin's probate process and the advisor's role within it. Participants will learn how to navigate the probate process, identify strategies to help clients avoid probate, and recognize the common mistakes that can expose advisors to liability. This course equips you with the legal framework and practical tools to serve your clients with confidence and understand how to best assist in transferring a decedent's legacy during a difficult time.

### 9:35 – Nate Chang, CFA – Fidelity Investments

#### Title: **Portfolio Construction Institute**

Portfolio Construction for Turbulent Times: In a market defined by volatility, uncertainty, and rising tail risks, clients are turning to advisors for clarity and confidence. Portfolio Construction Institute is designed to help advisors cut through the noise and provide actionable insights for their clients.

This session will help you:

- Cut through complexity and elevate your portfolio conversations
- Draw insights from thousands of real advisor portfolios, highlighting the most common gaps and opportunities
- Showcase how Fidelity is building more resilient models for 2026 and beyond

### 10:35 – Jeff Kelling & Ryan Rabe – CarePatrol

#### Title: **Senior Living 101: Financial Planning for End-of-Life Care in Wisconsin & the Tale of Three Families**

This session provides a practical overview of senior living options, funding strategies, and Wisconsin-specific policies that impact care planning. Through real-world examples, participants will better understand care options, costs, and planning considerations.

Learning Objectives include -

- Identify the continuum of senior care options and match them to appropriate client needs.
- Differentiate between Medicare, Medicaid, and private pay funding strategies.
- Recognize common Medicaid myths and planning pitfalls.
- Evaluate planning outcomes using real-life scenarios.
- Integrate senior care planning into financial strategies.

### 11:35 – Alisa Kolodizner – Prairie Hill Holdings

#### Title: **Managing Risk in Real Estate Investments**

The U.S. real estate market (all property types) is valued in excess of 71 trillion dollars, which is of similar size to the market capitalization of the entire U.S. stock market. The strong long-term performance of real estate has made it a favored asset class of institutions, family offices, and individuals. The risks, however, that are present in real estate investments can be difficult for advisors to ascertain because of the diverse investment structures, strategies, and property types found in the asset class. This course will provide advisors a framework that will enable them to better assess existing real estate risks in client portfolios and to better evaluate prospective investments in the real estate asset class.

### 1:15 – Connor Brincklow – Natixis Investment Managers

#### Title: **Managing Taxable Investments: Techniques for Mitigating Tax Costs in Investing**

This course is part of the *Tools of the Trade* educational series and is designed for financial professionals seeking to enhance their tax-aware investing strategies. Participants will explore the impact of taxes on investment portfolios, learn to interpret recent tax legislation, and apply

advanced techniques such as tax loss harvesting, gain deferral, and asset location. The course emphasizes practical applications through Direct Indexing and Separately Managed Accounts (SMAs), equipping advisors with tools to deliver greater after-tax value to clients.

**2:20 – Mark Eisenmann – Luther Group & Tony Revolinski, CPA – Wipfli Advisory**

**Title: Private Real Estate Investing: Diversification and Tax Efficiency**

Attendees will learn about the unique considerations and benefits of private commercial real estate investing and how it can add diversification to portfolios in a tax efficient manner. The discussion will provide an overview of private real estate investing including detailing different ownership structures and their differences, defining important related terminology, describing how returns are measured, differentiating major asset classes, discussing key risk considerations, providing a list of asset quality drivers, highlighting allocation strategies and detailing tax implications and potential benefits through the application of appropriate tax planning strategies.

# ***Free CE Day Speaker Bios***

## ***Jamie Barwin***

**Jamie B. Barwin, J.D., CPA** is a Shareholder in the Trusts & Estates Section at von Briesen & Roper, s.c., where she focuses her practice on estate planning, probate and estate administration, business and corporate planning, special needs planning, and tax. Jamie brings a distinctive dual-credential perspective to her work. She holds her J.D. from Chicago-Kent College of Law and is a licensed CPA in both Wisconsin and Michigan, with six years of prior experience at a Big 4 accounting firm. She is admitted to practice in Wisconsin, Illinois, Michigan, and the U.S. Tax Court. A frequent author on estate planning and tax topics, Jamie has been recognized in *The Best Lawyers in America*® for Corporate Law and Trusts and Estates Law (2024–2026) and as a Wisconsin Rising Star (2022–2024).

## ***Connor Brincklow***

Connor Brincklow is a Regional Director at Natixis Investment Managers for the Midwest territory. In his role, he is responsible for driving growth and prospecting new relationships with financial advisors within the independent, wirehouse and RIA channels. Specifically, he focuses on selling and educating advisors about Natixis and its affiliate products which include mutual funds, SMAs and ETFs across all asset classes. He joined Natixis in April 2024 where he previously held the role of Investment Consultant. Prior to joining Natixis, Connor spent a year at Fidelity Investments as a Customer Relationship Advocate.

Connor holds a BS in Finance from University of Rhode Island and is FINRA Series 7 and 63 licensed.

## ***Nate Chang***

Nathaniel (Nate) Chang is an institutional portfolio strategist for Wealth Advisory and Portfolio Solutions at Fidelity Institutional® (FI). Fidelity Institutional is a division of Fidelity Investments that offers investment insights, strategies, and solutions, as well as trading services to a wide range of wealth management firms and institutional investors. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing, and other financial products and services to institutions, financial intermediaries, and individuals.

In this role, Mr. Chang leverages and builds upon Fidelity's extensive experience in multi-asset, multi-manager portfolio construction and collaborates with Fidelity's investment management, product development, and distribution channels to deliver open architecture investment consulting to Fidelity's advisory and institutional clients on portfolio construction, investment due diligence, manager selection, asset class/product expertise, and advisor/client education. Since its inception in 2013, the PCG team has crafted over 40,000 custom-tailored portfolio reviews while also contributing to unique research and analytics around asset allocation, strategies, and risk.

Prior to joining Fidelity in 2022, Mr. Chang spent seven years in institutional investing as an investment officer for the \$30B+ City of Los Angeles' Pension Plan(s). Mr. Chang focused most of his time managing the public equity portion of the portfolio with additional coverage duties within the private real estate and credit opportunities asset classes. Before joining civil service, Mr. Chang spent time as an equity research associate, investment associate, and investment analyst at various firms, including Imperial Capital, Franklin Resources, and Benefit Funding Service Group.

Mr. Chang earned his bachelor of science degree in business administration with an emphasis on finance from Cal Poly Pomona and his master of science degree in finance from Indiana University, Bloomington. He also holds the Financial Industry Regulatory Authority (FINRA) Series 7 and 63 securities licenses and is a CFA® charterholder.

## ***Mark Eisenmann***

Mark Eisenmann is a Partner and the Executive Vice President of Capital Markets for Luther Group, where he leads the firm's capital markets strategy and oversees financing initiatives that drive growth across its real estate portfolio. With more than 25 years of experience in real estate development and finance, Mark brings deep expertise in structuring complex transactions, securing capital, and guiding projects from concept to completion. He is a member of Luther Group's investment committee, weighing in on all of Luther Group's acquisition and development decisions. Before joining Luther Group, Mark served as Chief Financial Officer

for a national healthcare building development company, where he secured over \$1 billion in financing and managed the sale of more than \$800 million in healthcare real estate assets.

### ***Jeff Kelling***

**Jeff J. Kelling** is the Owner of CarePatrol of Greater Milwaukee & SE Wisconsin, where he helps families navigate the complex process of identifying appropriate senior living and care solutions. He specializes in evaluating care needs, financial considerations, and guiding families toward safe, appropriate, and cost-effective care options.

Jeff considers himself fortunate to serve seniors and their families during a time when many emotional and practical issues must be considered. He listens carefully to all of the client's needs, concerns and preferences before recommending appropriate levels of care such as Independent Living, Assisted Senior Housing, Memory Care, or In-Home Care.

### ***Alisa Kolodizner***

Alisa is an entrepreneur, investor, and former top-ranked institutional sales leader with deep expertise in financial services, private equity, and real estate. She was ranked #1 in institutional sales nationally and recognized among the top 1% of financial advisors at a Fortune 500 financial institution.

With a background in financial services and emerging technology, Alisa led enterprise partnerships with 300 of the most successful investment firms in the U.S, managing over \$3 billion in assets. She has built sales and product teams from the ground up, supported dozens of strategic mergers and acquisitions, and coached hundreds of financial advisors nationwide.

Beyond Prairie Hill, Alisa is the Managing Partner of Acumen Strategy, a holding company built for the wealth management ecosystem, with portfolio companies including Glynac AI, AcuBooth, and Acumen Labs. She leads strategy and serves as a hands-on advisor, bringing decades of experience building within the wealth management industry. She previously acquired and exited a cultural competence training firm through a private equity transaction.

Alisa also co-founded Local Up, a multi-billion-dollar revenue stream aimed at closing the \$25T market gap in small and medium-sized business lending. She is a Certified Financial Planner™, a board member of Genesys Works Chicago, and holds a B.S. in Environmental Science from the University of Illinois and Executive Education credentials from the University of Chicago Booth School of Business.

### ***George Peek***

**George S. Peek, J.D.** is a Shareholder in the Trusts & Estates Section at von Briesen & Roper, s.c., where he assists clients with a broad range of estate planning and administration services, including estate and trust administration, preparation of estate planning documents, guardianships and conservatorships, and fiduciary litigation. He also counsels both for-profit and nonprofit businesses on organization, succession, corporate governance, and risk management. George holds his J.D. from Marquette University and is admitted to practice in Wisconsin and Illinois, as well as the U.S. District Court for the Eastern and Western Districts of Wisconsin and the U.S. Court of Appeals for the 7th Circuit. A frequent presenter on estate planning topics, he has also spoken for the WICPA on charitable giving through business foundations. George has been recognized in *The Best Lawyers in America*® for Trusts and Estates (2024–2026).

### ***Ryan Rabe***

**Ryan F. Rabe** is the Owner of CarePatrol Sheboygan and Surrounding Counties, serving families throughout eastern Wisconsin. He is dedicated to helping seniors and their families understand and navigate the continuum of care and align care decisions with financial realities. Ryan is a Certified Senior Advisor (CSA). He brings a unique and highly analytical perspective to senior placement, backed by over 20 years of experience as a Project Manager and Human Capital Management (HCM) Consultant. This background allows him to manage the complexities of senior transition with the precision of a seasoned consultant and the heart of a dedicated advocate.

Ryan remains “high-touch” in a high-tech world, personally meeting with every client and accompanying families on every community tour. His commitment to the field extends into the community, where he serves as a board member of the Dementia Care Network, volunteers for the Alzheimer's Association, Ozaukee County Caregiver Coalition, and Ozaukee County Dementia Friends. Ryan's goal is to ensure seniors age with dignity in an environment that is safe, comfortable, and sound.

### ***Tony Revolinski***

Tony Revolinski, CPA is a senior manager on the construction and real estate practice's cost segregation team. He has over 9 years of involvement in the real estate industry, with knowledge of the engineered approach of cost segregation for both new construction and purchased properties. Tony has experience with cost segregation studies, Section 179D studies, 45L energy tax credit, and certifications for geothermal and solar investment tax credits. He has worked in various industries including auto dealerships, commercial real estate, food processing facilities, health care, manufacturing, retail strip malls, senior living facilities, short term rentals and multifamily housing. His deep industry knowledge, understanding of construction finances, and ability to analyze construction drawings enable him to provide clients with significant tax savings.