



Marquette Associates Continues to Expand Wealth Consulting Capabilities

CHICAGO, IL, February 13, 2019 – Marquette Associates, Inc. today announced plans to expand its wealth consulting offerings with an ownership interest in Milwaukee-based investment adviser, Operose Advisors LLC.

“Providing a high net worth solution built upon our institutional approach has been a key focus of our long-term strategy over the last number of years,” said Brian Wrubel, President & CEO of Marquette. “Operose shares our culture of client service and our investment philosophy. This partnership creates an integrated solution for private clients with assets ranging between \$1-25 million and small market investment advisory opportunities.”

Operose Advisors provides investment advisory and wealth management services to individuals, families, trusts, and closely-held businesses. By partnering with Operose, Marquette will establish its fifth office and continue to expand its presence in Wisconsin. Managing Partner Nicholas Bauer, CFA, leads Operose Advisors and has 20 years of investment experience. He and his team in Milwaukee will ensure continuity of service, while leveraging Marquette’s institutional model and benefiting from added resources.

Marquette also welcomed Aimee O’Connor, CFP® as a senior vice president in January to continue expanding the firm’s ultra-high net worth/family office capabilities based in Chicago. As a senior investment consultant, Aimee is involved in the daily management and administration of Marquette’s private client relationships. She has 14 years of investment experience including work as an independent consultant working with RIAs, family offices, and high net worth individuals. Previously, she was the co-director of consulting and senior consultant at DiMeco Schneider & Associates.

“We are excited at the opportunity to add Aimee to our team. Her considerable background working with private clients is a great fit as we steadily grow this part of our business,” said Wrubel. “The partnership with Operose, and the addition of Aimee, uniquely positions Marquette to offer a cost-effective, institutional approach for private families of all sizes.”



About Operose Advisors

Operose Advisors LLC is an investment adviser registered with the State of Wisconsin. We are dedicated to growing the wealth, knowledge and professional networks of the clients we serve by employing an institutional approach to wealth management.

About Marquette Associates

Marquette Associates is a Chicago-based, independent investment consulting firm that guides institutional investment programs with a focused client service approach and careful research. Marquette has served a single mission since 1986 – enable institutions to be more effective investment stewards. Marquette places client fiduciary duties first through complete independence and 100% employee ownership. The firm currently serves more than 385 clients with over \$182 billion in assets – from public funds, unions and corporations to endowments, foundations and other non-profits. For more information, please visit www.marquetteassociates.com.

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