



Ellenbecker
Investment Group

**PHILANTHROPIC
YEAR IN REVIEW
2023**

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A Note from Our President

A NOTE FROM OUR FOUNDER

I am pleased to welcome you to this special booklet dedicated to the importance of philanthropy in both my life and in the world of business. As the founder of Ellenbecker Investment Group, I believe that philanthropy is not merely an act of giving but an essential pillar upon which our successes are built. From the very inception of our business, I recognized that profit alone cannot measure the true value of our success. Our mission extends beyond the bottom line, it is about making a meaningful difference in our community and the lives of those we serve.

However, philanthropy is not just about financial contributions, it is also about giving our time, expertise, and passion to causes that matter. It is about rolling up our sleeves and actively participating in making the world a better place. Philanthropy, for me, isn't just a checkbox on our corporate agenda, it is a calling. It is a way of life that resonates deeply with who we are as a company and as individuals. Philanthropy is the bridge that connects our business to the broader world, promoting a sense of purpose that goes well beyond financial transactions.

For our employees, philanthropy is more than just a corporate initiative, it is a shared passion. It is the spark that ignites our team's enthusiasm, turning a group of individuals into a closely knit family driven by common purpose. It has been a gift to watch our employees grow, not just in their professional roles but as compassionate, caring individuals who understand the importance of giving back. It is heartwarming to see the joy they find in the small meaningful acts of kindness at work and in the community that add up to making a difference in the lives of others, creating a ripple effect that extends far beyond our office walls.

I want to personally thank you for being a part of this amazing journey. Your support and commitment to our quarterly community giving fuels our determination to do even more, to reach further, and to make a lasting impact...together we are writing a story of hope, compassion and positive change.

Karen Ellenbecker

Founder, Ellenbecker Investment Group
& The EIG Charitable Foundation

A portrait of Karen Ellenbecker, a woman with short grey hair and glasses, wearing a white blouse and a pearl necklace. She is smiling and standing in front of a background with yellow diagonal stripes on a grey wall.

Karen Ellenbecker



OUR MISSION

To live a generous life and encourage and educate others doing the same to enhance the philanthropic community.

BOARD OF DIRECTORS

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President

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EIG Liaison

JILL ECONOMOU
EIG Liaison

EIG CHARITABLE FOUNDATION'S FOUR PILLARS

**WOMEN &
CHILDREN**

COMMUNITY

EDUCATION

VETERANS

Philanthropy has always been a pillar of EIG's business model since opening its doors in 1996. On the firm's ten year anniversary, the EIG Charitable Foundation was launched to formalize this practice. Over the years, the Foundation worked to better define its giving plan and established the four pillars of giving as a guide to consider when choosing nonprofit organizations (NPOs) to support.

If you are interested in learning more or making a donation to the EIG Charitable Foundation, please contact Karen or Julie at (262)691-3200.

QUARTERLY COLLECTIONS

Q1

WISCONSIN HUMANE SOCIETY

Founded in 1879, the Wisconsin Humane Society (WHS) has been saving lives of animals in need for more than 140 years. WHS is a 501(c)(3) organization that operates animal shelters in Milwaukee, Ozaukee, Racine, Door, and Brown Counties, as well as a spay/neuter clinic in West Allis.

WHS is community-focused with programs that include a pet food bank, youth programs to educate & inspire the next generation, a foster program for animals in domestic violence situations, dog training classes, and other outreach programs.

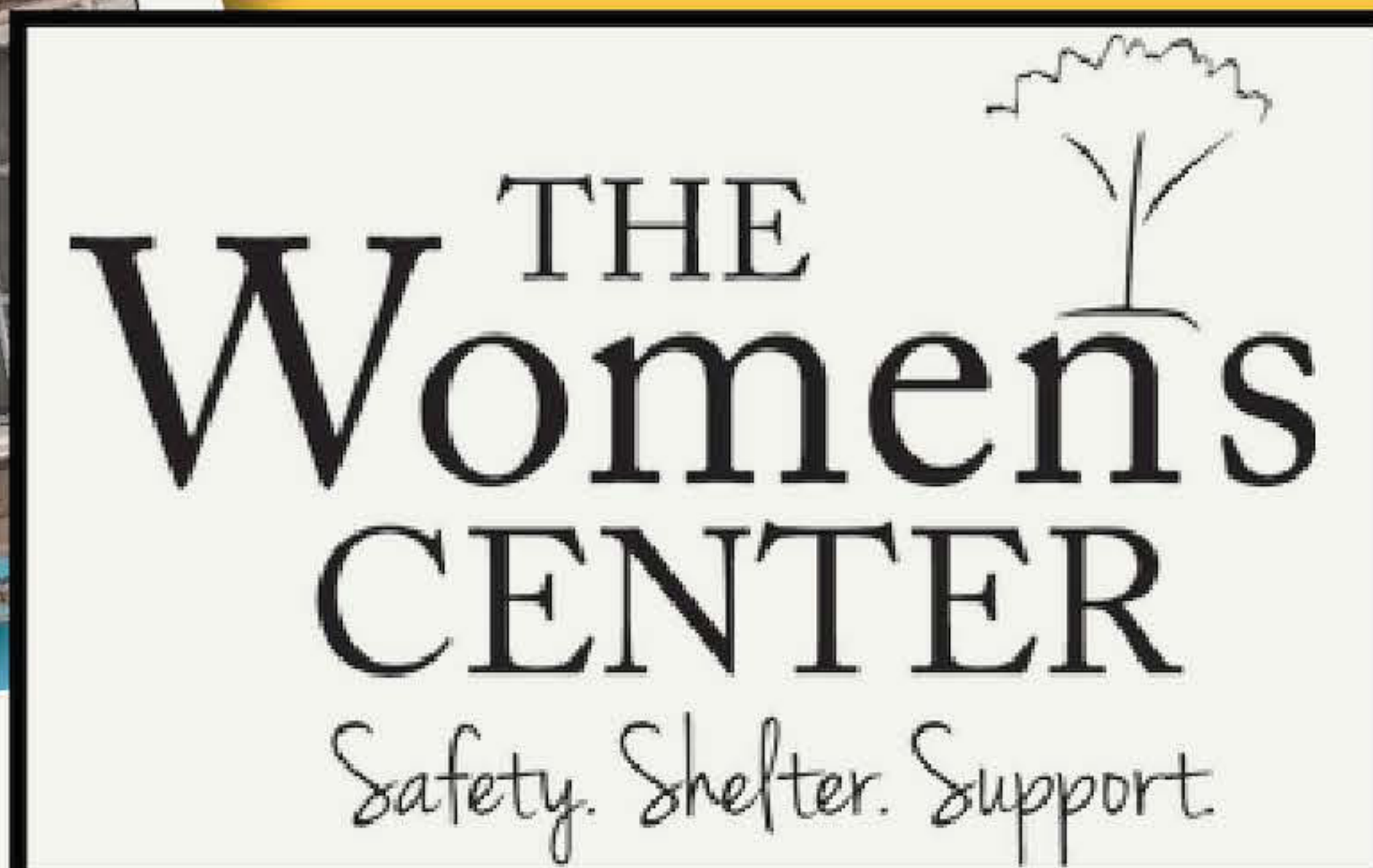


Q2

THE WOMEN'S CENTER

Founded in 1977, the mission of The Women's Center (TWC) is to provide safety, shelter, and support to empower all impacted by domestic abuse, sexual violence, child abuse, and trafficking.

As Waukesha County's only agency of its kind in a county that spans 580 square miles, TWC provides a range of life-saving and life-changing programs and services that heal and empower adults and children on their paths to build a future free from violence.



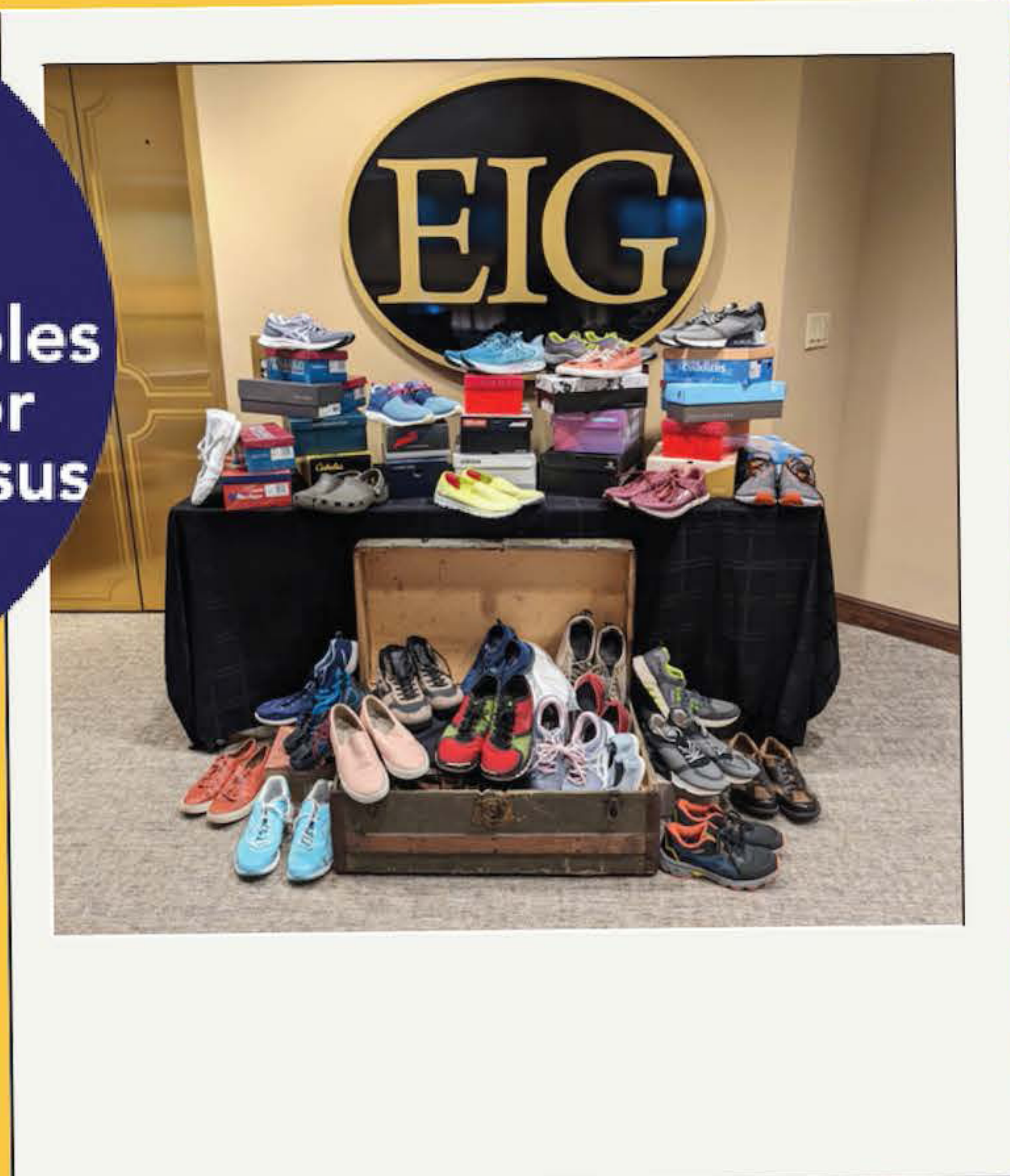
Each year the EIG Charitable Foundation, with suggestions from EIG team members, selects four nonprofit organizations (NPOs) to be the beneficiaries of EIG's quarterly collection drives.

Q3

SOLES FOR JESUS

Founded in 2009, Soles For Jesus (SFJ) exists to share the love of Christ by distributing shoes to the underserved in sub Saharan Africa.

Shoes are a basic luxury that people take for granted every day as we choose our favorite pair from our closet floor. It is estimated that over one billion pairs of unworn shoes are taking up space in U.S. basements and closets. Some are outdated or outgrown, but many of them are in good condition and considered a treasure in a developing country.



Q4

CHRISTMAS CLEARING COUNCIL

Since 1949, The Christmas Clearing Council of Waukesha County has promoted and coordinated giving to families in need during the Christmas season. They provide a clearinghouse that matches families with area groups, businesses, and individuals who wish to help families less fortunate.

In 2022, The Christmas Clearing Council coordinated giving to more than 2,100 families and 4,800 children in Waukesha County.



THE EIG TEAM

Philanthropy is one of the core values that EIG lives by as a company and is supported by each of our team members. Beginning in 2019, on an employee's work anniversary they are gifted \$1000 to donate to up to two charities of their choice. The nonprofits who have received these donations represent a wide range of causes, nicely reflecting the values of each of our team members.

Another benefit each EIG employee receives is one day per year that can be used to volunteer for the organization of their choice. Team members can choose to do this work on their own or as a team, bringing coworkers together in service. Many team members serve on various boards of directors for nonprofit organizations and/or volunteer their time regularly outside of these EIG encouraged volunteer opportunities.



Hunger Task Force



Blankets for H.A.W.S



Versiti Blood Drive

TEAM MEMBER ANNIVERSARY DONATIONS

A DOLL LIKE ME

ADULT CONGENITAL HEART ASSOCIATION

ALLIANCE OF HOPE FOR SUICIDE LOSS SURVIVORS

BAILING OUT BENJI - WI CHAPTER

BLESSINGS IN A BACKPACK

BOMBSHELL BULLIES PIT BULL RESCUE

CALVARY BAPTIST SCHOOL

CHRISTMAS CLEARING COUNCIL

COMPASSION INTERNATIONAL

CONSERVANCY FOR HEALING & HERITAGE

CYSTIC FIBROSIS FOUNDATION - WI CHAPTER

DISCOVER CHURCH REACHTEAMS

FISHING FOR THE HEART

FONDY FARMERS MARKET & FOOD CENTER

FUREVER FRIENDS SANCTUARY

H.A.W.S. OF WAUKESHA

JACARRIE KICKS4KIDS

JAZZ UNLIMITED

KIDS MATTER INC.

KIMBERLY JOY MINISTRIES INC.

K-LOVE

LAKE COUNTRY CHARITY CONNECTION

LIFE'S CONNECTION

LITTLE LAMBS ACADEMY NEW BERLIN

MIDWEST AUSTRALIAN SHEPHERD RESCUE

NORTHBROOK CHURCH

PEACE LUTHERAN CHURCH

REDEEM & RESTORE CENTER, INC.

RESILIENCE RACING FOUNDATION

RUNS WITH WOLVES

SOLES FOR JESUS

ST. BAKHITA CATHOLIC WORKER HOUSE

ST. JOHN'S MILITARY ACADEMY

ST. JUDE CHILDREN'S HOSPITAL

STYLES 4 KIDZ

THE AUGUSTINE ACADEMY

THE MARLEH LEHMANN SCHOLARSHIP FDN.

THE TABLE - ALICE'S GARDEN URBAN FARM

THE WOMEN'S CENTER

TUNNEL TO TOWERS FOUNDATION

UNDERDOG PET RESCUE OF WISCONSIN

VARIETY - THE CHILDREN'S CHARITY OF WI

WAUKESHA COUNTY YOUTH HOCKEY ASSOC.

WEST AFRICAN MERCY MINISTRIES

We are excited to share our employee-directed giving program with you and feel strongly that giving back to the community is always positive. EIG supports our employees and welcomes diversity of thought and opinions, and we are committed to bringing community awareness to these organizations. Every organization listed is a qualified 501c3 and has received at least \$500 from the Ellenbecker Investment Group Charitable Foundation in 2023. The missions of these organizations do not necessarily reflect the opinions of Ellenbecker Investment Group employees and leaders.

EIG'S VETERANS APPRECIATION EVENT

EIG's third annual Veterans Appreciation Event was held Thursday, August 17th and welcomed nearly 300 guests to an evening of gratitude, celebration, and education. From racing to fishing, people to dogs, twenty nonprofits who support vets were featured at the event, allowing each to tell their story and speak to how they help veterans and how individuals can get involved.



*** SAVE THE DATE! OUR NEXT VETERANS APPRECIATION EVENT IS SEPTEMBER 5TH, 2024.**

FEATURED ORGANIZATIONS

AMERICAN LEGION PEWAUKEE POST 71

BELL TOWER MEMORIAL

CAPT. JOHN D. MASON VETERAN PEER OUTREACH PROGRAM

CENTER FOR VETERANS ISSUES

DAUGHTERS OF THE AMERICAN REVOLUTION - MILWAUKEE CHAPTER

FISHER HOUSE WISCONSIN

FISHING FOR GOOD FOUNDATION

H.A.V.E.N. INC. (HOUNDS AND VETS EMPOWERED NOW)

HEALING WARRIOR HEARTS

PARALYZED VETERANS OF AMERICA - WISCONSIN CHAPTER

R&R HOUSE MENTAL HEALTH AMERICA OF WISCONSIN

RESILIENCE RACING FOUNDATION

STARS & STRIPES HONOR FLIGHT

U.S. ARMY RESERVE PEWAUKEE UNIT

VETERANS OF FOREIGN WARS - WI

VETERANS OUTREACH OF WISCONSIN

WAR DOGS MILWAUKEE

WAUWATOSA CURLING CLUB WITH AUSA MILWAUKEE CHAPTER

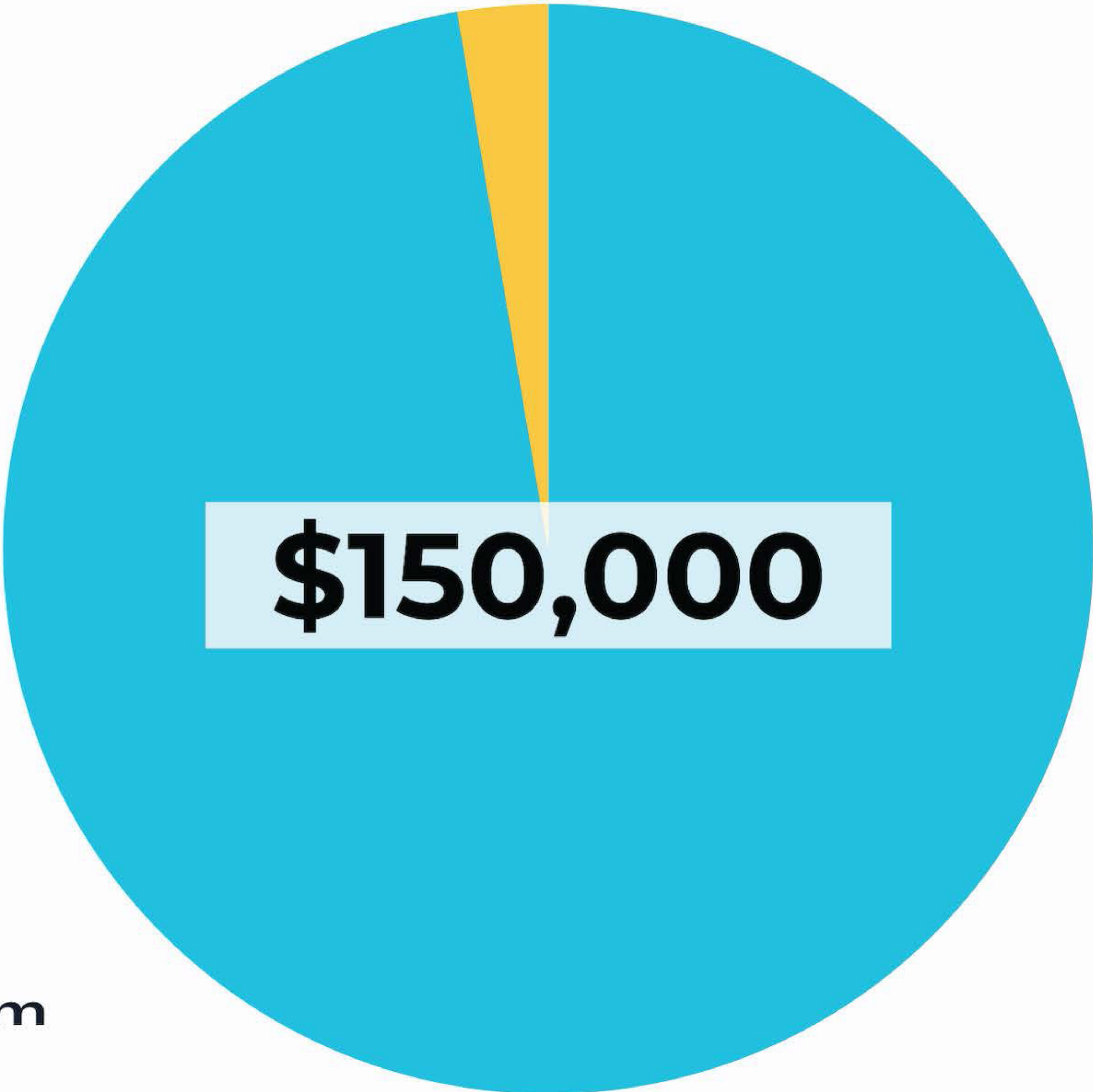
WISCONSIN DEPARTMENT OF VETERANS AFFAIRS

WISCONSIN VETERANS CHAMBER OF COMMERCE

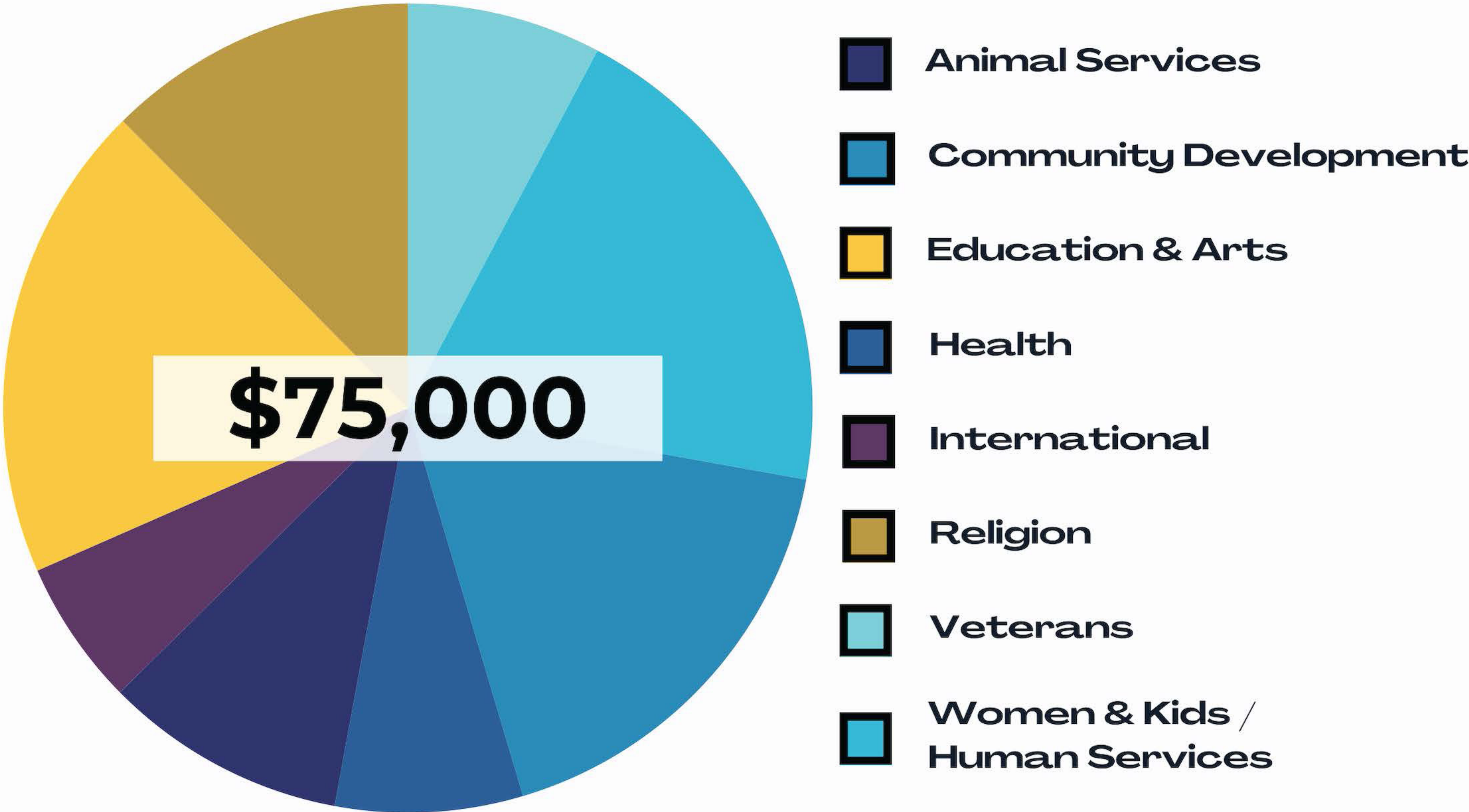
2023 FUNDS RAISED FOR THE EIG CHARITABLE FOUNDATION



- Contributed by EIG
- Donated by EIG Team Members



EIG CHARITABLE FOUNDATION DONATIONS & EIG SPONSORSHIPS



BETTER BUSINESS BUREAU SERVING WISCONSIN, BIZTIMES NONPROFIT EXCELLENCE, C-SUITE FOR CHRIST, CHILDREN'S WISCONSIN FOUNDATION, ERAS SENIOR NETWORK, FELLOWSHIP OF EXTRAORDINARY WOMEN, FONDY FOOD CENTER, IMPACT 100, LAKE COUNTRY CHARITY CONNECTION, MCMURTY FINANCIAL SYMPOSIUM, MILWAUKEE FILM, NEXT 18, ORLANDO HEALTH FOUNDATION, PEWAUKEE AREA ARTS COUNCIL, POSITIVELY PEWAUKEE, ROGERS BEHAVIORIAL HEALTH, TEMPO WAUKESHA, WAUKESHA COUNTY BUSINESS ALLIANCE, WHITEFISH BAY CIVIC FOUNDATION, WOMEN & GIRLS FUND, THE WOMEN'S CENTER, WOMEN IN WORSHIP, PLUS ELLENEBECKER INVESTMENT GROUP TEAM MEMBER ANNIVERSARY DONATIONS & FOUNDATION-DIRECTED GIVING

EIG IN THE COMMUNITY

- 100% of EIG team members donated to nonprofits
- 90% of EIG team members volunteered in 2023
- 25% of EIG team members served on boards in 2023



Karen Ellenbecker
Founder & Sr. Wealth Advisor

Founder & Vice President, EIG Charitable Foundation
Founder, Pillows with Wings
Founder, Connect Nourish Grow
Founder, Resident Nana
pillowswithwings.com



Julie Ellenbecker-Lipsky
President & Sr. Wealth Advisor

President, EIG Charitable Foundation
Committee Member, Boys & Girls Club Greater Milwaukee,
Camp Whitcomb/Mason
bgcmilwaukee.org/our-locations/camp/



Cara Olson
Chief People Officer

Vice President, Golf Fore Wolfe & A Cure
runwithwolves.org



Christine Remmers
Controller

Treasurer, Pillows with Wings
Treasurer, Connect Nourish Grow
pillowswithwings.com



Heather Deaton
Wealth Advisor

President, Fondy Food Center
fondymke.org



Heather Hipke
Chief Financial Officer

Committee Member, Wauwatosa Curling Club
Treasurer & Board of Directors, Discovery World
wauwatosacurlingclub.com
discoveryworld.org



Kristina Schnuckel
Director of Client Experience & Wealth Advisor

Board Member, West African Mercy Ministries
westafricanmercy.org



Sandra Geisler
Director of Tax Planning

Treasurer & Board Member, Life's Connection, Inc.
lifesconnection.org



Sara McGuire
Director of Marketing

15+ Years Volunteer, Wisconsin Humane Society
wihumane.org



Tammy Niemann
Wealth Advisor

10+ Years Volunteer, Soles for Jesus
solesforjesus.org



Milwaukee's Philanthropic Community

with Jill Economou

presented by



Hosted by EIG's Director of Community Relations, Jill Economou, this unique radio show features non-profit organizations each week and explores ways for listeners to have an impact in our local community and the world.

Airing Sundays at 10 am on WISN AM 1130, Milwaukee's Philanthropic Community celebrated five years on-air in 2023. Over 400 nonprofits have been featured in that time!

Do you know a nonprofit that would be a great guest for the show? Would you like to listen to a past episode? All of this info can be found at ellenbecker.com/radio.



2023 GUESTS

MILWAUKEE'S PHILANTHROPIC COMMUNITY

A DOLL LIKE ME, ADVOCATES OF OZAUKEE, AMERICAN HEART ASSOCIATION, ALLIANCE FOR THERAPY DOGS, BASICS IN MKE, BEST BUDDIES OF WI, BETTY BRINN MUSEUM, CAPT. JOHN D. MASON VETERAN PEER OUTREACH PROGRAM, CARROL UNIVERSITY, CENTER FOR VETERANS ISSUES, CENTERS FOR INDEPENDENCE, CHILDRENS WISCONSIN FOUNDATION, CHRISTIAN FAMILY SOLUTIONS, COMMUNITY DEVELOPMENT ALLIANCE, COMMUNITY SMILES DENTAL, CONVERGENCE RESOURCE CENTER, CROHN'S & COLITIS FOUNDATION, ERAS SENIOR NETWORK, EVANGELICAL CHILD & FAMILY AGENCY, FEED MY STARVING CHILDREN, FELLOW MORTALS, FELLOWSHIP OF EXTRAORDINARY WOMEN & KIMBERLY JOY MINISTRIES, FISHING FOR GOOD FOUNDATION, FOOD FOR THE POOR, FRIENDS WITH FOOD, FROEDTERT & THE MEDICAL COLLEGE OF WI, HAVEN, INC., HEARTBEATS INC., HEBRON HOUSE, HELEN BADER INSTITUTE FOR NONPROFIT MANAGEMENT, IMPACT 100 GREATER MILWAUKEE, JAMES PLACE, JOCKEY INTERNATIONAL, JOURNEY HOUSE, KENOSHA ACHIEVEMENT CENTER, KENOSHA HUMAN DEVELOPMENT SERVICES, LAKE AREA FREE CLINIC, LAKE COUNTRY CARES, LEUKEMIA & LYMPHOMA SOCIETY, LIFE NAVIGATORS, LIFE STRIDERS, LIVING ONE HANDED, MADACC (MILWAUKEE AREA DOMESTIC ANIMAL CONTROL COMMISSION) , MERTON AUXILIARY, MERTON FIRE DEPARTMENT, MILWAUKEE COMMUNITY SAILING CENTER, MILWAUKEE HOMELESS VETERANS INITIATIVE, MILWAUKEE WATER COMMONS, MKE LEADERS, MOMS MENTAL HEALTH INITIATIVE, NEAR WEST SIDE PARTNERS INC., NONPROFIT ACADEMY OF WISCONSIN, NURSES AFFECTING CHANGE, OPERATION DREAM, OUR TREASURES, INC., PEARLS FOR TEEN GIRLS, PERISCOPE PROJECT, R&R HOUSE OF PEWAUKEE, REDEEM & RESTORE CENTER, SALVATION ARMY OF WAUKESHA COUNTY, SHARP LITERACY, SIEBERT LUTHERAN FOUNDATION, SILVER SPRING NEIGHBORHOOD CENTER, SPECIAL OLYMPICS OF MILWAUKEE, ST. COLETTA OF WISCONSIN, ST. JOHN'S STARFISH FOUNDATION, ST. MARCUS SCHOOL, STARS AND STRIPES HONOR FLIGHT WISCONSIN, STRONG MILWAUKEE CENTER, TBey ARTS CENTER, INC., THE HOPE CENTER OF WAUKESHA COUNTY, THE HOPE HOUSE OF MILWAUKEE, THE MACC FUND, THE OASIS PROJECT, THE STORIES PROJECT, THE WAR MEMORIAL, THE WOMEN & GIRLS FUND OF WAUKESHA COUNTY, TRINITY WOODS AT MOUNT MARY UNIVERSITY, URBAN ECONOMIC DEVELOPMENT ASSOC. OF WISCONSIN, USO WI, VERSITI BLOOD RESEARCH INSTITUTE, VETERANS OUTREACH OF WISCONSIN, VOLUNTEER SERVICE CLUB OF PEWAUKEE, VOW VILLAGES, WALKERS POINT YOUTH & FAMILY CENTER, WAUKESHA COUNTY COMMUNITY FOUNDATION, WESTCARE WISCONSIN, WISCONSIN LUTHERAN COLLEGE, WISCONSIN AUTISM EMPOWERMENT, WISCONSIN HUMANE SOCIETY, WOMEN'S CARE CENTER, ZILBER FAMILY FOUNDATION



NPO LEADERSHIP TRAINING

For the past 3 years, EIG welcomed leadership from a number of local nonprofit organizations (NPOs) to our Education Center for a fully-sponsored half-day seminar focusing on topics to enrich and motivate including, massive impact, storytelling, and using humor to communicate your message. These sessions were so valued by attendees that EIG plans to host two sessions per year beginning in 2024.

Acknowledgments



On November 2nd, 2023, EIG Wealth Advisor Heather Deaton won *Corporate Volunteer of the Year* at the Nonprofit Excellence Awards by BizTimes Milwaukee! As a firm, EIG was honored to be a finalist for *Corporate Citizen of the Year*, for the second year in a row.



Corporate Volunteer of the Year!



11/2 @ Nonprofit Excellence Awards

A NOTE FROM OUR PRESIDENT

Looking back over the last 28 years of Ellenbecker Investment Group and our philanthropic efforts has been an enjoyable process... looking ahead is even more fun! Let's embark on this journey together.

I want to take a moment to thank our employees, clients, and friends for your commitment to philanthropy and the contributions you make to our community. Philanthropy, giving back, and the spirit of altruism are pillars that hold our communities together and fuel progress. The act of giving, whether through monetary donations, volunteering time, or sharing resources, has a profound impact on countless lives, reflecting the collective strength of our society.

We did not prepare this report to toot our own horn, but rather to inspire you and other organizations to follow suit. It is possible to put others above profits... and it is also possible to grow a successful business and legacy while giving back. We step forward to make a difference and to set a powerful example for others to do the same.

In 2024, I encourage you to continue your philanthropic endeavors by giving back with time, talent and treasure, all while inspiring others to do the same. As clients, you are the heart of our organization, and we invite you to be a part of our mission to give back through philanthropy.

Here are some ways you can join us:

- Volunteer Opportunities: Keep an eye out for opportunities to volunteer with your EIG family.
- Quarterly Charity Collections: Watch our newsletter and weekly email for our giving drives.
- Charitable Events: Attend our annual Veterans Appreciation Event
- Tune In: Listen to our radio show, Milwaukee's Philanthropic Community (MPC) Sundays at 10am on AM 1130 and recommend future guests.
- Learn & Plan: Learn how to give your charitable contributions tax efficiently. Talk to your EIG team to set up a personalized charitable giving plan.

By giving back, we not only contribute to making the world a better place, but we also create a culture of compassion, kindness, empathy, and shared responsibility. Let us stand together and make a difference in the lives of those who need it most.

Together, we can leave a legacy and inspire positive changes.

With Gratitude,

Julie Ellenbecker-Lipsky

Julie Ellenbecker-Lipsky
President, Ellenbecker Investment Group
& The EIG Charitable Foundation





N21 W23350 RIDGEVIEW PKWY.
WAUKESHA, WI 53188
(262) 691-3200

A billboard advertisement for Ellenbecker Investment Group. The billboard is set against a yellow background with a white chevron pattern. The billboard itself has a white left side with the EIG logo and company name, and a grey right side with a photo of two women and a slogan. The slogan "Our passion for service defines our culture®" is written in a white, cursive font. The billboard is mounted on a black metal frame.


Ellenbecker
Investment Group



*Our passion
for service
defines our
culture®*