



Advisor Biography

Adam Ausloos, MBA CRPC

Managing Principle / Financial Advisor

As the managing principle of AdviceWorks Wealth Advisors, I offer a detail interactive financial planning process and customized financial strategies for high-net-worth individuals, executives with concentrated stock positions, family trusts, business owners, real estate owners, medical professionals, and retiree's. My goal is to thoroughly understand my clients' financial priorities so that I may earn their trust and tailor financial strategies that achieve all objectives while exceeding all servicing expectations. I do this by first listening to my clients to fully understand their current situation and future objectives as well as potential concerns. I then implement investment solutions that address their risk tolerances, time horizon, liquidity needs and overall investment goals. My recommended strategies are designed to fit each client's unique goals by utilizing the wealth of knowledge of industry specialists and incorporating all available appropriate firm resources. I pride myself on a disciplined wealth management process built on established investment principles while allowing the flexibility to adapt quickly to address the increasing complexities of today's markets. My service-focused approach, combined with my ability to explain financial strategies effectively gives my clients comfort, and enables my clients to concentrate on their priorities at each stage of their lives with confidence.

Adam earned a B.S. Degree from Carroll University in Waukesha WI. He also earned an Executive MBA with honors from UW-Milwaukee Lubar School of Business. Adam is an active member of the UW-Milwaukee Lubar EMBA Alumni Association and was elected by his peers to sit on the board. Adam has 10 years' experience in the banking and lending industry with 7 years in local and regional management roles for HSCB and CITI Bank. Adam leverages his lending experience to provide his clients with access to capital through various local bank channel partners. Adam understands the business owner client as well as the C-Level executive client because of his personal entrepreneurial experience. Adam built, ran, and sold several successful start-up businesses since 2005. Adam is passionate about business, continuous improvement, and providing high quality resources to help create solutions to address the many complex concerns his clients face professionally and personally. Adam enjoyed performing high level corporate leadership and business development duties but gained most satisfaction from coaching his employees to achieve their full potential, to surpass their goals, and have the ability to provide a better life for their families. Adam strives tirelessly to provide the positive outcomes for all of his clients. Adam does find time to work out weekly, golf, relax on the lake or pursue various water sports, and spend time with his family, friends, and loyal dog when business allows.

My Investment philosophy:

I manage money the way large institutions, endowments, and trusts manage money. My core satellite investment philosophy (blend of active & passive management) focuses on Wealth Preservation models with significant downside protection while allowing favorable upside capture. Long story short, 2008 taught us that fixed income and equities are much more correlated than what modern portfolio theory had suggested. As a result, I utilize modern portfolio theory to allocate into market appropriate diversified assets classes with a tactical sleeve to protect against rising interest rates and an alternative sleeve to reduce volatility. This creates a much smoother consistent ride for my clients given the complexity of today's market. I do not chase returns rather apply a systematic approach that is suitable, sustainable and repeatable. I have a research team that provides 24/7 implementation of my investment philosophy and robust systematic investment process. By managing teams of the most recognized asset managers in the industry it provides an additional level of fiduciary protection by pooling the resources of many for the benefit of my clients. One key value I provide is access to asset managers or similar strategies without the need to have millions to meet minimum investment requirements. In short I bring Institutional investment resources and strategies to the middle class in a cost effective manner.