

VANTAGE FINANCIAL

By Sharie Sinson, Director of Marketing, Client Relations at Vantage Financial



How it all began: David Niederbaumer (Center, Huron, SD) and sons Matt Niederbaumer (L - Huron Office) and Jesse Niederbaumer (R - Elm Grove office).

LIFE EXPERIENCE AND TIME ARE TWO OF OUR BEST TEACHERS. Life teaches us to make good use of our time, and time teaches us the value of life. How you decide to spend your time is a daily decision that should not be taken lightly.

HOW WE CAN HELP

At Vantage Financial, we believe time is an asset. Managing money is challenging and time-consuming. Financial planning is not a one-time project that you can complete, put on the shelf, and move on with your life. It's a puzzle without the end pieces, and pieces can be added, changed or removed. With everything families juggle, it's hard to stay on top of all financial topics, from work benefits, taxes, educational planning, investments and everything in between. All of this requires your time and attention.

We understand that pause buttons do not exist in

real life, and this is where we can help. We walk alongside our clients as their partner, guiding them through their personal financial obstacle course to make sound decisions and provide peace of mind. In this process, our mission is to free-up time for you to enjoy what matters most to you and your family.

Over the past few years, our business has significantly grown as we continue our commitment to using best practices while acquiring diverse expertise to help more people gain control of their financial future. What started with a couple advisors in Elm Grove has expanded to a team of more than twenty spread across three states and four offices. Building relationships with clients is what we love to do, and their financial security and ease of mind drive our passion to partner with more people on their financial journey.

FROM THE BEGINNING TO TODAY

Our story began more than 30 years ago in small town South Dakota. This is where Dave Niederbaumer has tirelessly served his community and clients for decades. Brothers Jesse and Matt Niederbaumer grew up with front row seats witnessing how a business built on the foundation of putting clients' interests first withstands the test of time. Dave, a family-first businessman, is now more than 70 years old and continues to be a mentor to us all. Vantage is founded on these same core principals. As a fiduciary, we provide ongoing, consistent, client-driven advice through a fee-transparent, comprehensive planning process.

Finances were already a source of anxiety and stress for many, but especially during a once-in-a-lifetime pandemic. We want to be there for our clients. We saw 2020 as an opportunity to enhance and expand our offerings, and we are very excited about the most recent addition to the Vantage team. Our newest partner and senior wealth advisor, Kevin Ellis, is a family-first longtime resident of Brookfield, who brings with him three decades of tax and financial service experience. Kevin believes in our client-centric approach while acting as a fiduciary for those he serves.



Elm Grove, WI - Racine, WI
Loveland, OH - Huron, SD



Let's start a conversation.

13500 Watertown Plank Rd., Ste. 207
Elm Grove, WI 53122
P | 262-439-8587
W | vfplanning.com

YOUR PARTNER. YOUR SUCCESS.

Unbiased approach. Comprehensive process. Ongoing Consistency. Fee transparent.

Vantage Financial is part of the Thrivent Advisor Network, LLC, a registered investment advisor.

His expertise, forward-thinking approach, and passion to help others, make him an outstanding resource for all Vantage clients.

COMMUNITY ENGAGEMENT

In each of our four offices, you will find the Vantage team rooted in their communities. As a member of the Elmbrook community for over seven years, we are proud sponsors of the Elm Grove Jr. Guild’s Annual Tree of Giving, the Elmbrook Education Foundation’s Ladies’ Night, St. Mary’s Visitation Parish auction, and The Elm Grove Community Foundation’s Oktoberfest in the park. As members of the Elm Grove Business Association, we look forward each year to opening our doors to the community’s time-honored traditions—the Elm Grove Memorial Day parade and the festive Holiday Open House.

Vantage is especially proud to support local athletes through our Vantage Student Athlete of the Month Scholarship program. In May, the Elm Grove office will award the fifth annual \$1,500 Vantage Scholarship to a graduating high school senior who resides in Elm Grove or Brookfield. Additionally, our Huron office will award its first annual scholarship, and we look forward to expanding this opportunity to the Loveland, Ohio area in 2022.



Newest Vantage partner and senior wealth advisor, Kevin Ellis, with his wife, Sherryl, and their three children (Brookfield residents).

There is a good chance you will see a member of the Vantage team walking the family dog (Dash, Riggins, Luna) at the village park, picking up the family dinner at Sendik’s or the Kettle Range Meat Company, supporting a son or daughter at a Tonawanda, Brookfield East, Brookfield Central or Marquette University High School event, serving on the board for FOEGL, Western Racquet Club, HOPE Network or Shorewood Foundation

(to name a few), and most importantly, spending time with family and working with clients in this special community.

The Vantage team is ready to partner with you. Let’s start a conversation.

To learn more about us, visit our website: [www@vfplanning.com](http://www.vfplanning.com).