Our Clients Are as Unique as the Wealth Management Plans We Create with Them
We treat clients like there’s a lot riding on each decision—because there is.

Our clients use us as their lead wealth advisor and manager

Our clients have goals and needs beyond where they are today—some stretching beyond their lifetime. Our advisors work with them to co-create a wealth management plan that organizes all aspects of their financial life. Their new plan establishes goals and guidelines for:

- Accumulation
- Growth
- Protection, and
- Distribution

Accumulate: Retirement Planning, College Funding, Life Events, Inheritance, Acquisition Strategy (Real Estate/Personal)

Grow: Asset Allocation Strategy, Investment Management, Tax Management

Protect: Short Term Cash/Liquidity Management, Debt Management, Insurance

Every client is unique

They know what they’re pursuing in life and what they need from their financial resources to achieve their goals and ambitions. Since 1937, we have had the great privilege and responsibility to be their lead wealth advisor. This is a role we are well suited for and one we take very seriously. In fact, we measure our client relationships in years, and often generations, as we move in unison with our clients toward shared goals.

We begin by listening to our client’s life story—where they’ve been, where they’re going, and how they think about money and wealth.

We’ve learned that our clients have different values, interests and needs regarding their financial resources. We also know that the individuals and families we serve are dynamic, in that their ambition and financial needs are always evolving. As such, our role as their lead wealth advisor is to help them make the financial decisions that support their most important life decisions, in conjunction with their other professional advisors. This includes topics like current and future lifestyle, college education for children and grandchildren, retirement, health and legacy.

We treat clients like there’s a lot riding on each decision—because there is.
We create wealth management plans in partnership with our clients

To create their plan, clients work with a lead wealth advisor who draws on and orchestrates a group of experts from within or outside of Mesirow Financial. The key is to aggregate and consolidate information on all assets, investments, insurance, debt, and trust documentation so that, together, we can see how all the pieces should fit together.

When the comprehensive plan is completed, clients see how their life goals can be achieved and we work continuously with them to help make that vision a reality. As a result, they experience a rewarding sense of confidence, satisfaction and peace of mind.

Some of the things clients talk to us about

- Building a wealth portfolio designed to reach their targeted retirement date
- Partnering with a trusted advisor to help with estate planning and generational wealth
- Creating a legacy of giving back to their community, schools, and foundations
- Receiving access to a trusted advisor on their terms, and knowing who to call and when
- Understanding trends in the financial marketplace, and how and when to adjust their wealth portfolio
- Helping with life’s natural expenses: new home, saving for college, wedding plans
- Assisting with developing appropriate retirement income plans
We’ve been advising and protecting families like yours since 1937.

Benefits of working with Mesirow Wealth Advisors

**Our focus is simple: your success is our success**
As independent wealth advisors and investment managers, our attention is on our clients. We have no higher agendas, product quotas or inherent conflicts of interest. This allows us to provide advice that is truly objective and tailored to your needs.

**You benefit from 80 years worth of practice**
Mesirow Wealth Advisors is the oldest and original part of Mesirow Financial. We were founded by Norman Mesirow with the same purpose and values we have today: to advise individuals and families on the best possible use of their financial resources to support their life goals and do so with the highest standard of professionalism. 80 years later, our professionals serve a diverse group of clients across the country.

**Our commitment is built for the long haul**
We know that life is full of financial decisions that need readdressing time and again. That is why we make our clients a priority and are available to listen and advise whenever needed. We provide understandable, clear options, and work with you in deciding which option is best for you at different times in your life.

**You receive a better experience**
We listen intently to ensure we understand your unique objectives and strive to exceed your expectations. We also communicate with you regularly to help you navigate economic and market cycles to ensure your strategies continue to be effective, and that you are on target to achieve your unique goals. Authentic communication, consistent accessibility, and an unwavering commitment to service define the Mesirow approach.
About Mesirow Financial

Mesirow Financial is an independent, employee-owned firm founded in 1937. As specialists in investment, risk management and advisory services, we are committed to helping our institutional, corporate and individual clients achieve their objectives. Our professionals are inspired by an entrepreneurial desire to develop tailored solutions designed to deliver measurable results. To learn more, please visit mesirowfinancial.com.