



## Elaine Rich, CFP®

608-275-3442 erich@enrichpartners.com

**Family Business Founder and Owner**

**Fiduciary and Investment Expertise**

Elaine Rich has served on seven boards as President, committee chair, and treasurer. Her governance, compliance and fiduciary skills are appreciated by those organizations she serves. She has experience in managing money for individuals and corporations, including wealth advisory services, setting up and managing defined contribution plans and leading investment management strategies. She has worked with hundreds of companies and individuals and oversees \$350M in assets under management. As a co-founder and leader of a successful business for over 20 years, she has survived difficult market conditions and seen trends for her clients to maximize their wealth and financial security. She is a trusted fiduciary.

### Board Experience

<b>TEMPO Madison</b>	2016 – Present
President 2021- 2022, Executive Committee 2018- Present, Board Director 2016-2017	
<b>Dimensional Fund Advisors, Working with Professional Women Committee</b>	2023
<b>The Business Forum, Membership Committee Chair</b>	2014 -2017
<b>A Fund for Women, Special Events Committee</b>	2014-2016
<b>United Way of Dane County, Account Executive</b>	2007-2010
<b>LPGA Amateurs, Madison, President 2003-2004, Board member 2002-2005</b>	2002–2005
<b>Madison Jaycees, Treasurer and Board Member</b>	2001-2004

### Career

Elaine has worked with one of the largest firms in the financial services industry and started two wealth advisory businesses. She works with clients from varied socio-economic backgrounds and amounts of wealth. Her understanding of the markets and needs of each individual or organization has been a key to her success. She is well versed in advising on client compensation structures, employee benefit plans, retirement and executive deferred compensation plans, company restricted stock and stock options, risk management, income taxation, business entity formation, financial statements, and estate planning.

<b>Co-Founder, Wealth Advisor, EnRich Financial Partners LLC</b>	2003-present
<b>Founder, Wealth Advisor, E.M. Beckett &amp; Associates</b>	2000-2003
<b>Vice President, Financial Advisor, M.P. Merrill &amp; Associates</b>	1997-2000
<b>Defined Contribution Plan Team Representative, Hewitt Associates</b>	1995-1996

### Education

B.B.A. University of Wisconsin Madison, Finance & Investments major	1994
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### Certifications

Certified Financial Planner, CFP®	1999
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Elaine's planning advice has been featured in Family Money Magazine and Wisconsin Women Magazine, as well as on local TV stations. She has been a guest speaker on the topic of developing financial independence for UW-Madison Engineering and Personal Finance students. In Business Magazine has featured Elaine's Executive Profile, and she appeared as their Professional of the Week.