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Joy in **Finance**

Waveform Wealth Partners specializes in aligning finances, inspiring freedom, and magnifying significance.

Waveform Wealth Partners brings a positive spin to wealth management, prioritizing continual growth, vibrant customized planning, and winning together. A result of their client-focused philosophy and successful outcomes, most of the company's clients are personal referrals from those satisfied with past experiences with the firm.

"'Coordinated, individualized wealth management' is an industry standard, but we've elevated the concept," says Dave Dettmann, CFP®, WMCP®, CLU®, ChFC®, partner and cofounder of Waveform Wealth Partners. "We're a well-rounded team of knowledgeable professionals who work collaboratively to find solutions—it's a Midwestern thing." Highly energetic and creative, the firm thrives when faced with complex problem-solving, and a team of four CFP® professionals and other highly qualified experts provide vital insights on everything from deeply personal family concerns, generational planning, philanthropic causes, and, of course, finances.

Dettmann and cofounder Joshua C. Willour, CFP®, CLU®, approach ancillary services in the same spirit as they do their fiduciary investment advising: with clients' best interests at the forefront. "Knowing we will always have their back is liberating," says Willour. "Successful people often feel isolated. Once they have a solid sounding board, decision-making becomes easier. They're more confident moving forward."

Outsource the Mundane

The team at Waveform Wealth Partners doesn't solely rely on a client's risk tolerance for guidance—they connect clients' passion and legacy to their balance sheets. "We listen intently," explains Dettmann. "By helping individuals, businesses, and families develop a vision statement for their wealth, we are building the foundation for every succeeding decision."

Perhaps most striking about the Waveform client experience is a first-class concierge sophistication with an incredibly wide scope of services and personalized enhancements. "We won't leave our clients to handle the everyday, nitty-gritty details," says Willour. "We become a trusted partner. Rather than with a lengthy to-do list, they leave our office with clarity and with peace of mind, trusting that our team will facilitate additional required details with their other trusted advisors. They are free to pursue what gives their lives purpose. We make life beautifully simple."

"Our goal is to be a welcomed part of each client's support system. We want every appointment to be keenly anticipated, not an interruption," concludes Dettmann. "Decades later, we want clients to say, 'Working with Waveform was the best decision of my financial life.'"

WAVEFORM WEALTH PARTNERS

Northwestern Mutual®

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"We connect clients to a better life—one filled with more joy, purpose, impact, and significance."