VENTOUX
FINANCIAL ADVISORS, LLC

Ventoux Financial Advisors, LLC is proud to announce an advisor collaboration.

In early 2020, I joined together with two other Chicago-area independent advisors to form a consultancy group with the goal of elevating our client service, financial planning and investment management to new heights. We each strive to be even better advisors and are dedicated to helping each other reach that goal. Through weekly meetings we review best practices in financial planning, discuss and share insights on planning software, processes and other advisor practice tools, and review market trends and investments.

Together we work with 180 different families and entities and have over 70 years of experience researching investments, managing portfolios and comprehensive financial planning. Group credentials include MBA, CPA, JD, MS Accounting, Accredited Investment Fiduciary and Certified Financial Planner.

My fellow consultancy group members are listed below:

Kurt Winiecki - Winiecki Wealth Management

Kurt Winiecki started Winiecki Wealth Management in 2011 to focus on helping real people with their complex financial lives. He works hard to help clients make confident, reasoned decisions through personalized financial and investment strategies. As planned, his financial services career combines his finance, accounting and law degrees while providing the deep, personal relationships his prior careers lacked. Having the technical expertise to research any subject as an attorney (or the tax code as an accountant) is uniquely helpful to WWM's clients' long-term strategies.

Michael Willman – Blue Sky Investment Partners, Inc.

Michael is the founder and president of Blue Sky Investment Partners, Inc. Blue Sky Investment Partners is an independent, fee-based advisor founded in 2007. Our mission is to provide our clients a supportive financial framework so they can live a rewarding and meaningful life. We accomplish our mission by first identifying how a client's assets connect to meaning and purpose in the client's life goals. We then work with our clients to create a financial action plan and craft a custom portfolio designed specifically for each client. Michael has both a B.S. in Finance and an M.B.A. from De Paul University and over 28 years of experience researching investments, managing portfolios and building and helping to execute financial plans.

William J. Nedza – Ventoux Financial Advisors, LLC

William J. "Bill" Nedza is a Certified Financial Planner™ with over 30 years in the financial industry. The main focus of his practice is comprehensive financial planning and investment advisory services for high-net-worth individuals, families, and medical professionals. He assists clients in the areas of risk management, tax planning, estate planning, retirement planning, investment advisory and employee benefits. Bill's main goals when working with his clients are to get to know them very well, make them comfortable throughout the process, educate them financially, and be one of their most trusted advisers. Most importantly Bill maintains the highest level of integrity with his clients and all people and companies with whom he interacts, and he always acts in a fiduciary capacity, placing his clients' interests first and foremost. Bill has a B.S from the College of Commerce from DePaul University, is a licensed insurance agent, and has multiple securities industry registrations.

The above-described consultancy group is not an advisory firm. Each of the three advisory firms is fully independent of one another and provides its own investment and planning advice to its clients. The formation and use of the consultancy group creates no new or additional (a) contracts or agreements with or (b) liabilities or responsibilities for any advisory firm or any client of any advisory firm.

The privacy notices for each advisory firm can be found via the firm websites:

https://www.winieckiwealth.com/

http://blueskyinvestments.net/

https://www.ventouxfa.com/