

Our Key Moments

- 1992** Paula opened the firm as a sole proprietor. At that time, taking a comprehensive approach, using low-cost index funds, and operating within a fee-only business model were distinguishing features in a financial planning industry just beginning to separate itself from traditional sales-driven investment services.
- 1994** Paula published [“Portfolio Theory Creates New Investment Opportunities”](#) in the Journal of Financial Planning, making the case for using modern investment principles when advising individual investors, and [“Money and Kids: A Parental Guide to Teaching Financial Responsibility”](#) in the AAll Journal, an article that foreshadowed today’s great emphasis on teaching financial literacy.
- 1995** Paula completes a five-year term as president of AAll-Wisconsin.
- 1997** NAPFA Advisor published Paula’s article [“Planning Perspectives: Generation X”](#) detailing how GenXers face different life challenges and therefore different planning needs.
- 1998** Medical Economics Magazine named Paula one of the country’s best financial advisors for doctors for the first of multiple years.
- 2001** Mutual Fund Magazine named Paula to its national list of top financial planners.
- 2002** Paula received the Robert J. Underwood Distinguished Service Award for her substantial contributions to [NAPFA](#) and to the financial advisory profession.
- 2004** Paula moderated [The Great Debate](#) between Zvi Bodie and Jeremy Siegel at the NAPFA National Conference in which Jeremy Siegel agreed with Zvi Bodie that inflation-indexed lifetime income annuities are the go-to asset class for your base level of income in retirement.
- Assets under management reach \$50 million.
- 2005** Paula and Zvi Bodie published [“For Long-Term Investors the Focus Should Be on Risk”](#) in the AAll Journal, detailing a more sophisticated view of how to think about personal investment risk.

Bloomberg Wealth Manager identified Hogan Financial as one of the nation's top advisory firms for the first of four consecutive years.

Paula and one of our interns co-authored [“The College Planning Smorgasbord”](#) for the Financial Planning Journal.

2006 Assets under management reach \$100 million.

2007 Paula published [“Life-Cycle Investing Is Rolling Our Way”](#) in the Journal of Financial Planning, summarizing the paradigm shift for financial planning advocated by economists Zvi Bodie and Nobel Laureate Robert Merton in their 2003 Financial Analyst Journal articles, a paradigm shift adopted by our firm as a result of their teachings and mentorship.

2008 Bloomberg Wealth Manager Magazine/AdvisorOne named Paula to the “Top 50 Women in Wealth” list for the first of three years.

2012 Paula published [“Financial Planning: A Look From the Outside In”](#) in the Financial Planning Journal, laying out our view of financial planning and in particular how we combine the tenets of life-cycle planning with concierge-like personal attention and service.

2013 Our firm's philosophy was featured in a [cover story of Research Magazine](#) detailing how we have incorporated life-cycle theory into our advisory practice.

Two academic articles co-authored by Paula are published:

[Public Policy and Consumer Disclosure for the Income Annuity Market](#) (The John Marshal Law Review), advocating for fair investment markets for consumers, and

[Explaining Risk to Clients: An Advisor Perspective](#) (Oxford University Press), tracing the evolution of financial planning theory and practice and thus contributing to the ongoing conversation between practitioners and academics.

2016 Assets under management reach \$200 million.

A multi-year internal initiative to gradually shift from a sole-proprietorship to a multi-advisor firm becomes more visible to the outside world.

2017 Clint R. Wondra CFP®, CPA/PFS becomes a shareholder and Chief Operating Officer.



Assets under management surpass \$250 million.