

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.