May 12th Member Meeting
Session Descriptions

12:15pm – Khaleel Ali – Edvest 529 College Savings Plan

Understanding Withdrawals for Higher Education Expenses

Your clients are already aware of the benefits and tax-advantages of saving for higher education expenses with a 529 plan but are not always fully aware of what expenses can be covered. Better understanding eligible 529 expenses can help you to guide your clients to make informed decisions. Explore qualified expense categories including room and board, books, supplies, technology, K-12 tuition, apprenticeship programs, and student loan repayments to better understand how 529 savings may be used.

1:30pm – Mike Smith – CPS Horizon

Save the Family Cabin – Collaborative Learning Event

Family cabins and lake homes have been a provider of joy for many families. However, when the patriarch or matriarch pass, often how the cabin is passed and managed can cause contention within the surviving family. We will look at a case study and will learn legal, financial, and insurance strategies to allow for a family cabin or lake home to remain in the family across generations.

2:30pm –

Panel Discussion: Preserving the Family Cottage: Advanced Planning Strategies Using Trusts, LLCs & Risk Management

Preserving family cottages, hunting land, and vacation properties across generations requires more than good intentions—it requires coordinated, advanced planning. This multidisciplinary panel brings together experts in estate law, financial planning, insurance, and long-term care to explore practical strategies for structuring ownership, funding entities, managing risk, and maintaining family harmony. Through real-world examples and interactive discussion, attendees will gain actionable insights to help clients protect both the financial and emotional value of legacy properties.

Speakers' Bios

Khaleel Ali

Saving for higher education can actually help future college students do more than take on less debt, children with college savings are four times more likely to attend. Khaleel helps individuals and families save for higher education through a highly personalized and education-based consultative approach aimed at bridging the gap between needs and tailored solutions.

Khaleel has over 16 years of Financial Services Industry experience and holds FINRA Series 7 and 63 registrations. As a Senior Education Savings Consultant, he serves as a Plan Specialist for the Edvest 529 College Savings Plan. Khaleel can be found traveling throughout the state of Wisconsin, meeting with individuals giving presentations on the benefits of the 529 college savings plan, facilitating workshops to help advisors deepen their client relationships, and educating employers to increase awareness that 529 plans can be added to their employee benefits package as a no-cost financial wellness benefit.

Khaleel earned a Bachelor's degree in Business Marketing from Indiana University. Away from business, he enjoys cooking, watching basketball, playing tennis and golf, and spending time with family and friends.

Brandy Enger

As the Director of Personal Lines & Risk Management - Select, Brandy is responsible for both of the Practice Groups' overall strategies, vision, performance and culture.

A 20+ year insurance industry veteran, she specializes in applying her expertise and market knowledge for the benefit of her team and clients. Since joining Vizance in 2019, she has been instrumental in its growth by developing an enhanced client experience. An expert in the affluent market space, she develops creative solutions to solve complex insurance issues. Her other focus areas include mentoring the next generation of leaders and successfully onboarding new agencies that join Vizance. Brandy has earned shareholder rights and continues to positively impact the company by contributing to its growth.

In addition to her Director role, Brandy serves on the Business Management Advisory Board of WCTC and regularly speaks to student groups about the benefits of careers in insurance. She is also the President of the Volunteer Service Club of Pewaukee, an organization dedicated to raising funds and supporting organizations that help women and children.

Brandy is licensed in Property, Casualty, and Life Insurance. She has her Bachelor of Business Administration from University of Wisconsin-Whitewater.

Jill Martin

Attorney Jill Martin is a partner in Stafford Rosenbaum's Milwaukee office with a practice focusing on trusts and estates. With an extensive background in wealth strategy, in addition to estate planning, Jill works collaboratively with clients, CPAs, and financial planning professionals to provide guidance to high-net-worth families and individuals on defining and developing comprehensive estate and wealth transfer plans. Her focus areas include estate planning and wealth transfer, trust and estate administration, tax efficiency, and philanthropic goals.

A core pillar of Jill's practice is providing education to clients while making complex concepts easier to understand and implement. In addition, Jill focuses on practical solutions that clients and their advisors can properly and easily implement in an effort to avoid unexpected complications or circumstances.

Prior to joining Stafford Rosenbaum, Jill worked as a Wealth Strategist and Estate Planning Attorney with a Milwaukee wealth management firm and as the Regional Director of Trust for a national bank.

Deanne Phillips, CFP®, CDFA®, ABFP℠

Deanne Phillips as Managing Director of Client and Community Engagement, Deanne is responsible for developing and presenting workshop and webinar content to further the educational needs of our client base and ensure Annex's prospective clients are engaged with us and Know The Difference. She runs our Women & Wealth group at Annex; an education-based network of women, open to anyone in the community, designed specifically to foster collaboration, community and growth in specific areas of financial planning. Deanne also meets with prospective clients, working to secure the client relationship and then oversee those relationships for the long-term. As a Wealth Manager, she conducts initial portfolio reviews with clients to determine or validate current investment objectives, and prepares recommendations of appropriate investment models and allocations developed by Annex Wealth Management's Investment and Financial Planning teams. Before Annex Wealth Management, Deanne worked in holistic wealth management, most recently serving as Director of Investments for BMO Private Bank in Milwaukee. Deanne holds a Bachelor's degree from NYU, and has earned her CFP® designation.

Mike Smith, LUTCF, CLTC

Mike Smith is President of CPS Horizon Financial Group, an insurance brokerage firm. Mike's clientele are financial advisors, accountants, insurance advisors and attorneys whose clients need various insurance products.

CPS Horizon represents 3 dozen carriers and helps advisors with life, disability insurance, long term care, annuities, impaired risk cases, and living benefits. Prior to purchasing CPS Horizon, Mike was in personal production qualifying for life membership in MDRT including Court of the Table.

Mike has presented sales ideas, marketing programs, and information on current insurance and investment trends to the Million Dollar Round Table, The Financial Planning Association, The Society of Financial Service Professionals, and 5 times at the NAIFA National Convention.