Advisor Biography

Adam Ausloos, MBA CRPC

Founder / Fiduciary Financial Advisor

As the founder of AdviceWorks Wealth Advisors, I specialize in advance tax planning, unique trusts, and other tax solutions as the core foundation of a detailed interactive financial planning process. Access to offerings my most successful trust clients offer is a significant advantage when customizing diversified portfolio's that go beyond the status quote commiditized financial strategies that under preform. I serve high-net-worth individuals, dentists, trusts, business owners, real estate owners, medical professionals, and private placement Insurance policies. My goal is to thoroughly understand my clients' financial priorities so that I may earn their trust and tailor tax and financial strategies that achieve all objectives while exceeding expectations. I do this by first listening to my clients to fully understand their current situation and future objectives as well as potential concerns. I then implement investment solutions that address their risk tolerances, time horizon, liquidity needs and overall investment goals. My recommended strategies are designed to fit each client's unique goals by utilizing the wealth of knowledge of industry specialists and incorporating all available appropriate firm resources. I pride myself on a disciplined wealth management process built on established investment principles while allowing the flexibility to adapt quickly to address the increasing complexities of today's markets. My service-focused approach, combined with my ability to explain financial strategies effectively gives my clients comfort, and enables my clients to concentrate on their priorities at each stage of their lives with confidence.

Adam is a man of faith, strong believer in the greater good and empowering his clients through his work and service. He earned a B.S. Degree from Carroll University in Waukesha WI. He also earned an Executive MBA with honors from UW-Milwaukee Lubar School of Business. Adam is an active member of the UW-Milwaukee Lubar EMBA Alumni Association and was elected by his peers to sit on the board. Adam has over a decade of experience with advanced tax planning, trusts and private placement life insurance (PPLI). Adam is a visionary big picture entrepreneur who has started, built and ran 10 businesses including the three he currently manages. Adam understands the business owner client as well as the C-Level executive client because of his personal entrepreneurial experience. Adam is passionate about business, continuous improvement, and providing high quality resources to help create solutions to address the many complex concerns his clients face professionally and personally. Adam enjoyed performing high level corporate leadership and business development duties but gained most satisfaction from coaching his employees to achieve their full potential, to surpass their goals, and have the ability to provide a better life for their families. Adam strives tirelessly to provide the positive outcomes for all of his clients. Adam does find time to work out weekly, golf, relax on the boat or pursue various water sports, and spend time with his family, friends, and loyal dog when business allows.

My Investment philosophy: I manage money the way family offices, endowments, and trusts manage money. I blend market investments and non-market private placements to gain superior results and lower risk. My core satellite investment philosophy (blend of active & passive management) focuses on Wealth Preservation models with significant downside protection while allowing favorable upside capture. As a result, I utilize modern portfolio theory to allocate into market appropriate diversified assets classes with a tactical sleeve to protect against rising interest rates and an alternative sleeve to reduce volatility. This creates a much smoother consistent ride for my clients given the complexity of today's market. I do not chase returns rather apply a systematic approach that is suitable, sustainable and repeatable. I have a research team that provides 24/7 implementation of my investment philosophy and robust systematic investment process. By managing teams of the most recognized asset managers in the industry it provides an additional level of fiduciary protection by pooling the resources of many for the benefit of my clients. One key value I provide is access to asset managers or similar strategies without the need to have millions to meet minimum investment requirements. In short I provide access to Institutional investment resources and offerings paired with the best tax solutions available to grow, protect, and pass wealth on to the next generation.