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■ MILWAUKEE FINANCIAL ■



Financial Planning by Design

Mosaic Financial Group artfully helps clients assemble their financial lives.

For Darrin Englebert and Andrew Bird of Mosaic Financial Group, helping clients achieve dreams through skillful financial planning is an artform.

“When you think about a mosaic, it’s an intricate design of small, detailed pieces. It’s only when they’re all assembled together that you see the whole picture,” says Bird. “We help clients build a personal mosaic for their family’s financial future.”

The understanding that family is often at the center of clients’ decisions is part of the firm’s DNA. In fact, it’s a focus on multigenerational financial planning that first brought Mosaic together.

Under the direction of founding partner Charlie Sauer, the group began around the idea that clients should be taken care of for generations to come, bringing together Bird, CFP®, RICP®, CLU®, and Englebert, CFP®, RICP®—at the time, both at the helm of their own successful firms. Merging the three firms marked the start of a new era for a business backed by over 30 years of history and experience.

THE MOSAIC DIFFERENCE

Now partners at Mosaic, Bird and Englebert lead a deeply qualified team dedicated to helping clients who have built businesses, practices, and careers prepare

for retirement by converting hard-earned assets to fund dreams and peace of mind.

With five CERTIFIED FINANCIAL PLANNER™ professionals on hand—an unusually high number for a team—Mosaic’s approach puts clients at the center, allowing for guidance from the entire team. But for Englebert, building a team is about more than qualifications. “We have values we live by. We work hard, focus on the client, and care about our team and families,” he explains.

A MULTIGENERATIONAL APPROACH

Caring about clients means a commitment to guide their financial legacy for generations to come. “When advisors retire, clients often get passed off to someone unfamiliar. Not in our firm. If you’ve spent a lifetime building a business or career, you want a financial partner as committed to that as you are. We feel strongly that our clients should always be taken care of by the team they know and trust. And we’re structured to deliver on this,” says Bird.

That approach ensures Mosaic will deliver continuity of planning for clients and their families as the company grows. “We lead by example. When we advise business owners to have a business continuity and succession plan, it’s important we have

the same for our business as well,” explains Bird.

Behind Mosaic’s dedication is the satisfaction of helping clients realize their dreams, often faster than expected. The team delivers valuable help to highly educated professionals who have built successful careers and businesses but need guidance in transforming assets to fund a financially freeing retirement.

For Bird and Englebert, that experience is what makes all Mosaic’s hard work more than worthwhile.

“Our clients’ most valuable asset is time,” says Englebert. “There’s nothing more rewarding than when we help give clients more time with their family and peace of mind in their financial future.”



NORTHWESTERN MUTUAL PRIVATE CLIENT GROUP

100 E. Wisconsin Avenue Suite 2300
Milwaukee, WI 53202
414-615-1801 mosaicfinancial.nm.com

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