

## Operose Advisors Welcomes Mandy Nowaczynski



MILWAUKEE, June 28, 2023 – Operose Advisors announced today that Mandy Nowaczynski, CPA, CFP, MSPA is joining the team as the Director of Tax Services.

“Mandy’s tax and accounting expertise and experience will become valuable assets to our firm as it continues to expand.” said Nicholas Bauer, Managing Partner.

Mandy will lead the firm’s tax and accounting practice and will be responsible for family office accounting, tax planning and return preparation for clients. Mandy has 13 years of experience in tax and financial planning for clients. Mandy is also responsible for the firm’s corporate accounting and financial oversight.

Prior to joining Operose Advisors, Mandy was a Director with CliftonLarsonAllen (CLA), where she spent her time assisting clients with their tax filing and planning needs. Her clients ranged from high-net-worth individuals, trusts, real estate entities, and small businesses.

Mandy holds a B.S. in accounting and finance, and a Master’s in professional accounting with an emphasis in tax from the University of Wisconsin Milwaukee.

Mandy serves as the Treasurer for the Waukesha County Estate Planning Council and is on the Finance Committee for the Waukesha Civic Theatre.

### About Operose Advisors

Operose Advisors LLC is a Wisconsin-based investment adviser working in partnership with independent investment consulting firm, Marquette Associates, Inc. Our purpose is to deliver an institutional approach to individuals, families, trusts and closely held businesses with planning, execution, and feedback of investment programs. For more information, please visit [operoseadvisors.com](https://operoseadvisors.com).