



Goldstein Advisors
2501 Parmenter Street, Suite 100A
Middleton, WI 53562-2673

Office: 608.831.3230
Toll Free: 877.640.6894
Fax: 608.831.3235

mandi.gausewitz@goldsteinadvisors.com

Mandi Gausewitz

Chief Operating Officer / Financial Planner
CFP®, APMA®, CAP®, CRPC®, CLU®, CTFA®, ChFC®

In her role as Goldstein Advisors' chief operating officer, Mandi oversees the day to day administrative and operational functions of the business. In her role as a financial planner, she helps her clients with their intergenerational wealth transfer, trust, charitable giving, and estate planning strategies.

Mandi combines her financial expertise with desire to educate and explain complex concepts to aid her clients in making well-informed decisions. Believing in the value of a trusted, long-term relationship and that each client needs an individualized solution, she takes the time to get to know her clients well and understand their situations, needs, concerns and goals.

Mandi graduated cum laude from Ripon College with a Bachelor of Arts in Economics and received a Master of Science in Financial Services and a graduate certificate in estate planning and taxation from The American College of Financial Services. On an informal level, she strives to stay up to date on the latest industry changes and trends. She was named to Madison's In-Business Magazine's 2016 class of 40 Under 40 and was nominated for The Business Forum's Young Athena Professional Award in 2018.

Thanks to a year in France, where she worked as a teaching assistant, Mandi is fluent in French. She and her husband love to hike, bike and explore the great outdoors. Mandi also enjoys running, playing piano, knitting, Lego projects, cheese tasting, watching sports and traveling.

AREAS OF FOCUS

Estate Planning Strategies, Charitable Giving, Wealth Transfer, Intergenerational Planning

PROFESSIONAL DESIGNATIONS AND ASSOCIATIONS

- » Certified Financial Planner Professional (CFP®)
- » Accredited Portfolio Management Advisor (APMA®)
- » Chartered Advisor in Philanthropy (CAP®)
- » Chartered Retirement Planning Counselor (CRPC®)
- » Chartered Life Underwriter (CLU®)
- » Certified Trust and Financial Advisor (CTFA®)
- » Chartered Financial Consultant (ChFC®)
- » Society for Human Resource Management Senior Certified Professional
- » Senior Professional in Human Resources
- » Member, Financial Planning Association
- » Member, International Economics Honor Society
- » Member, Society for Human Resource Management
- » Treasurer and Executive Board Member, Wisconsin Youth Symphony Orchestras
- » Director, Lake Edge Handbell Choir



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