

Savant Wealth Management: To acquire WI-based Filbrandt Wealth Management

Posted on Friday, Nov 12, 2021

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ROCKFORD, Ill. (November 12, 2021) — [Savant Wealth Management](#), a nationally recognized, fee-only registered investment adviser (RIA) with nearly \$12 billion in assets under management (AUM), announced plans to acquire [Filbrandt Wealth Management](#), a Madison, Wisconsin-based RIA firm that works exclusively with university leaders and their families to achieve financial independence in retirement. Filbrandt, with approximately \$1.8 billion in assets under advisement, represents Savant's largest acquisition to date and is the firm's third acquisition this year. The deal is scheduled to close Nov. 30, 2021.

Filbrandt offers comprehensive financial planning services to university professionals across the U.S., using a three-step process — The Filbrandt Total Solution[®] — that integrates investment, retirement, and estate planning services to help clients meet their financial planning goals. Founded by Michael Filbrandt, CLU[®], ChFC[®], who serves as CEO and chairman of the board, and Patricia Filbrandt, CFP[®], CLU[®], and ChFC[®], who serves as the company's president, Filbrandt specializes in holding deep knowledge of the specific benefits plans at each of the universities where it serves clients.

“Our partnership with Filbrandt [is the first since our most recent recapitalization](#), and demonstrates Savant's commitment to expand our comprehensive platform of integrated service offerings,” said [Brent Brodeski](#), CEO of Savant. “With its unique

value proposition, Filbrandt will help Savant propel our growth and further enhance the outstanding value and service we provide clients.”

“In searching for a partner to continue our legacy of service to the university community, we were impressed by Savant’s growth strategy and approach to M&A activity,” said [Patricia Filbrandt](#). “But as we got to know the team, we also felt an immediate alignment with Savant’s culture. We look forward to working with Savant, and are pleased that our clients will have access to the firm’s deep bench and extended resources in the future.”

Savant’s previous acquisitions in 2021 included Michigan-based AMDG Financial, and Indiana-based Treybourne Wealth Planners. Savant’s recent strategic minority investment from Kelso & Company helped position the firm to continue its expansion of integrated service offerings and accelerate its growth trajectory.

About Savant Wealth Management

Savant Wealth Management is a leading independent, nationally recognized, fee-only firm serving clients for over 30 years with nearly \$12 billion in assets under management. As a trusted advisor, Savant Wealth Management offers investment management, financial planning, retirement plan and family office services to financially established individuals and institutions. Savant also offers corporate accounting, tax preparation, payroll and consulting through its affiliate, Savant Tax & Consulting.

Headquartered in Rockford, IL, Savant’s office locations include Bloomington, Chicago, Downers Grove, Freeport, Hoffman Estates, Lincolnshire, Naperville, Peoria, St. Charles, Sterling, and Wilmette, IL; Phoenix, AZ; Greenwood, IN; Plymouth, MI; Santa Fe, NM; Madison and Park Falls, WI; and McLean, VA.

Savant Wealth Management (“Savant”) is an SEC registered investment adviser headquartered in Rockford, Illinois. Past performance may not be indicative of future results. Different types of investments involve varying degrees of risk. Please see Important Disclosures at [savantwealth.com](https://www.savantwealth.com).

About Filbrandt Wealth Management

Based in the Madison, Wisconsin, Filbrandt Wealth Management (“Filbrandt”) is a fee-based, SEC registered investment adviser (RIA) firm offering comprehensive financial planning services to university leaders and professionals, and serving as our clients’ advocate with banks, attorneys, accountants, retirement plan vendors, investment brokers, university retirement offices, and insurance agents.