

Helping you reach your financial goals

Mike Hodan, MBA

Senior Vice President – Investments



Focus

Mike provides comprehensive planning for a select group of individuals, families, professionals and business owners. He uses a disciplined discovery and planning process called Envision® to create a roadmap for his clients. He focuses on providing innovative investment and retirement planning as well as portfolio management strategies.

Background and Experience

For over 25 years, Mike has helped clients address their financial goals and develop strategies by focusing on each individual's specific needs. With extensive experience in the wealth management industry, Mike has dedicated his career to delivering the personalized investment planning services his clients deserve.

In 2016-2018, Mike was named a Premier Advisor. The Wells Fargo Advisors Premier Advisor designation is held by a select group of Financial Advisors within the Firm as measured by business production, completion of educational components and professionalism.

Mike began his career as a CPA with Arthur Andersen & Co. in Milwaukee, WI where he developed his knowledge in tax planning. He joined M&I Financial Advisors in 1991, a predecessor firm of BMO Harris Financial Advisors, to take a team approach in providing personalized financial advice for individuals and families. In 2016, Mike and his team joined Wells Fargo Advisors to leverage

world-class resources to help his clients reach their goals.

Away From the Office

Mike spends his free time with his wife, Kathy, and their daughters Margaret, Molly, and Maura. Mike has enjoyed both coaching and watching his daughters in soccer and basketball. Mike enjoys playing golf and traveling with his family. Mike has also been very active working with numerous non-profit organizations as an active board member and cheerleader for these organizations. Mike, Kathy and their daughters reside in Brookfield, WI.

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