

News Release

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Dallas-Based Weilert Wunderlick Armstrong Announces Expanded Focus on Integrated Wealth Strategy and New Partners

Leading Northwestern Mutual agency recognized for multigenerational retirement income management and estate planning enhances client services

DALLAS, Feb. 1, 2018 – [Weilert Wunderlick Armstrong](#), a leader in wealth management and multigenerational retirement income planning, and registered representatives of Northwestern Mutual Investment Services, LLC, today announces a new name, WWA Integrated Wealth Strategy Group (WWA). The new name reinforces the firm’s holistic approach to individuals and their families to develop, implement and maintain a comprehensive retirement income and estate plan that will span generations. WWA is also introducing a new partner and principals that extend the firm’s expertise to support business owners and grow their national footprint, which now includes Dallas, Texas, Sherman, Texas, and Murray, Kentucky.

“Our new name and logo underscore our on-going commitment to integrated wealth strategies for our clients,” said Tom Weilert, CLU®, ChFC®, RICP®, partner and founder of WWA. “This team of seasoned Northwestern Mutual representatives — including my trusted partners, Chad Armstrong, , CLU®, ChFC®, CFP®, AEP®; Jason Bang, CFP®; and Kathleen Wunderlick, M.Ed — is recognized for supporting clients in protecting their lifetime of work and leaving a legacy for their families. With the addition of a new partner and principals and expanding our offices, clients can have even more confidence that we’re looking out for their future generations with sound, forward-looking strategies. This evolution in our wealth management practice is a fulfillment of my lifetime dream to offer holistic services, from personal life insurance to the company 401K plan. We work collaboratively with clients’ CPAs, attorneys and bankers — all with the goal of offering peace of mind through integrated financial planning.”

WWA is an industry leader in developing integrated wealth strategies addressing asset accumulation and investment flexibility during working years; managing risk and generating base income during retirement; and distributing wealth to future generations. The proprietary and thorough fact-finding process for individuals, [WWA Wealth Strategy Builder™](#), and for business owners, [WWA Business Strategy Builder™](#), puts all the complex pieces of a client’s personal and professional financial lives in one comprehensive plan, helping the client make the best decisions now and spanning generations.

The [new partner and principals joining WWA](#) are:

Tom Wunderlick, partner, a successful Dallas business executive, previously serving as director of business to business solutions at Container Store, president and owner of Elfa Installation Service, and president of BuiltRite Solutions. Wunderlick had been with WWA for 15 years before launching his businesses and recently rejoined the firm. Wunderlick understands first-hand the many challenges business owners face. His mission is to provide guidance for clients and business owners to attain financial security for their families.

“I’m excited to be back at WWA during this time of tremendous growth and advancements,” said Wunderlick. “We have a team approach here. Since many of our clients are business owners, we will bring insights that enrich long-term planning that complements their business strategies including succession planning, 401k plans, and all the different aspects that help keep key employees engaged.”

Joe Fallon, CFP®, CLU®, ChFC®, principal, is based in Sherman, Texas, and has been with Northwestern Mutual since 1980. Fallon graduated from Southern Methodist University (SMU) and holds a BBA in Business. Fallon holds the Certified Financial Planner™ certification, as well as the Chartered Life Underwriter, and Chartered Financial Consultant. Fallon has been with Northwestern since graduating from college. He spent the first 17 years in the Dallas office before moving back to his hometown.

Fallon added, “By aligning with WWA, I now have the support of a multigenerational team of planners to build and implement a customized retirement income and estate plan to meet each client’s personal needs. As a part of WWA, our team will be there to serve our clients and their families for the long-term. Our ‘one plan, one team’ practice will provide an all-encompassing view of our clients’ personal family situations and income needs, capital sources and investments, and most importantly, establish clients’ legacy through asset distribution.”

David Travis, CLU®, ChFC®, principal, is based in Murray, Ky. Travis began his career with Northwestern Mutual as a college intern. A graduate of Murray State University, Travis has both Bachelor of Science and Master of Science degrees from the university, which is located three hours south of Louisville, Ky. Travis holds the Chartered Life Underwriter and Chartered Financial Consultant designations. Travis first qualified for the Million Dollar Round Table during his senior year in college and several times subsequently.

About WWA Integrated Wealth Strategy Group

[WWA Integrated Wealth Strategy Group](#) is a leader in wealth management and multigenerational retirement income planning with a team of registered representatives of Northwestern Mutual Investment Services, LLC. For more than 30 years, the Dallas-based firm has been recognized for its holistic approach to developing, implementing and maintaining a comprehensive retirement income and estate plan that will span generations. WWA is an industry leader in developing integrated wealth strategies addressing asset accumulation and investment flexibility during working years; managing risk and generating base income during retirement; and distributing wealth to future generations. The proprietary and thorough fact-finding process, [WWA Wealth Strategy Builder™](#), puts all the complex pieces of clients’ financial lives in one comprehensive plan, helping clients make the best decisions now to protect a lifetime of work and leaving a legacy for their families. Learn more at <http://wwa.nm.com>.