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# LUKE M. SCHILLO

## DIRECTOR OF PLANNING AND PORTFOLIOS

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As the Director of Planning and Portfolios, Luke works with clients to provide comprehensive solutions to meet their financial goals. Luke coordinates detailed portfolio level analysis, prepares asset allocations based upon specific client needs and assists in the preparation of financial plans, ensuring that clients are comfortable about their future. Equipped with a deep understanding of the risks associated with investing in capital markets, Luke's advice regarding asset allocation and specific investment solutions gives his clients confidence when investing for current and future goals.

### PROACTIVE

Luke prides himself on his dedication to clients and counsels them to help achieve their financial goals. He enjoys getting to know his clients on a personal level. He also enjoys sharing his passion for financial markets with his clients to help them better understand how to turn their financial aspirations into reality.

### OUTSIDE OF THE OFFICE

Luke is a Chicago native and currently resides with his wife in the Lincoln Park neighborhood. He is an avid sports fan and enjoys spending time with his family and friends. Luke also enjoys staying active, and you may see him cycling on the lakefront or playing in fun, pick-up football games.

### BLOGS

- *Financial Literacy for the Rising Generation and Beyond*
- *Asset Class in Focus: Alternative Investments*
- *Charitable IRA Rollover Eases Tax Pain of RMDs*
- *Investment Challenges of the Affluent Investor*
- *Nine Facts About Retirement*
- *Four Reasons for the Return of Market Volatility*

### SERVICES

Goals-Based Planning
Asset Management
Tax-Managed Strategies
Wealth Transfer Strategies
Risk Mitigation/Insurance
Philanthropy & Gifting

### MEMBERSHIPS AND AFFILIATIONS

- Mercy Circle Foundation Board
- President of the Park Lincoln Condominium Association
- St. Xavier University Alumni Board

### CERTIFICATIONS AND LICENSES

- Series 65 Uniform Investment Adviser Law Examination

### EDUCATION

- B.B.A., Finance, Saint Xavier University
- M.B.A., Financial Planning, Saint Xavier University

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