

ANN K BRENNAN CLU

Ann is an accomplished broker and consultant with a focus on Executive Benefits, Succession planning and Wealth preservation for shareholders and their families.

Ann has developed extensive experience in designing custom benefit plans and financial funding models by serving clients primarily in the legal, healthcare, manufacturing and financial services industries for 29 years. Working with partners of law firms as well as shareholders and executives of private companies, she assists management in evaluating programs for their top people. Ann focuses on executive compensation issues including selective retirement, incentive and retention plans, succession planning and wealth transfer strategies. She evaluates corporate life, disability and long term care programs for executives and partners of professional firms.

Highly recommended by top executives, Ann works closely with leading attorneys, tax advisors and wealth managers to develop and implement financial strategies for her clients. Prior to starting her own firm in the financial services industry, she studied and worked in Paris and Hamburg for several years. Ann is fluent in French and German. She has also studied Spanish, Japanese and Mandarin.

Ann is a board member of the International Trade Club of Chicago and membership chair. She is a co-founder of the Executive International Forum of Chicago. She is an active supporter of the Heartland Institute. She is a member of Women of Vision.

Ann holds a Bachelor of Arts Degree in Modern Languages cum laude from Boston College and a Masters degree in German from Middlebury College. She lives in Lake Bluff, IL.