



# Hewins Financial | Wipfli Hewins Offers Perspective on Two Financial Industry Shifts at the 2017 eMoney Advisor Summit

SCOTTSDALE, ARIZONA, UNITED STATES, October 13, 2017 /EINPresswire.com/ -- From best practices to business growth to community presence through digital marketing, this year's eMoney Advisor Summit addressed a variety of advisor-relevant topics as part of an extensive, three-day program. Among the featured speakers were two members of Hewins Financial | Wipfli Hewins' (Hewins) ownership team: [Chief Strategy Officer Gretchen Halpin](#) and [Director of Employer Plan Services Erika Young, CRPS®, CPFA, AIF®](#). Each thought leaders in the field and in their respective areas of specialty, Halpin and Young individually led back-to-back breakout sessions, educating more than 100 financial-services industry leaders on Tuesday, September 26.

Halpin's session focused on the unprecedented growth of an emerging client demographic, one that has challenged advisors and firms to rethink their service approaches: women. As a whole, this group is evolving into an economic powerhouse, with many serving as the breadwinners of their families and managing the household finances — creating a new segment of personal and business investors. [A 2015 BMO Wealth Institute report](#) showed that women alone hold decision-making power over \$14 trillion of the nation's collective, personal wealth. Halpin addressed the rising need for advisory firms to focus on this crucial demographic from a business growth standpoint. To expand and better serve their female client bases, Halpin encouraged attendees to focus on being relatable and offer solutions that are tailored to what matters most to their clients' lives; she also explored new ways to connect with the demographic.

"The evidence of the shift in financial power from male to female is undeniable," noted Halpin. "Firms need to ensure that the experience they are providing resonates with this growing market segment of investors." Speaking from experience, Halpin has been a pioneer in women's initiatives within Hewins, which oversees approximately \$4.45 billion in client assets under management (AUM).

Taking on a similar timely issue, Young spoke about the changes brought on by the U.S. Department of Labor's (DOL)'s investment fiduciary rule, and specifically, what it means to uphold the fiduciary standard of care when serving retirement plans. As the leader of Hewins' more than \$800 million retirement plan practice, Young regularly educates both plan sponsors and advisors about fiduciary responsibility, and shared important best practices that she has developed over years of first-hand experience.

Young said that one of her primary objectives for bringing the noteworthy topic to the conference was that "the fiduciary rule has brought a new level of awareness and accountability to the industry — with the regulatory environment we are in, it's increasingly hard [for advisors] to simply dabble in the retirement space." During the session, Young further noted that advisors who are fully committed to building a compliant retirement plan practice and gaining expertise in the space will likely find it to be a great business decision for their firms moving forward.

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