



## Andrew Bird

CFP®, CLU®, RICP®, AEP®  
Wealth Management Advisor

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Andy Bird is a founding member of the Mosaic Financial Partners and has been named a 2024 Forbes Best in State Wealth Advisor. One of the main reasons he helped create Mosaic Financial Partners, along with partners Charlie Sauer and Darrin Englebert, is because he believes a client should get to work with an enduring firm – one which will outlive their advisor’s career. Andy believes that every client should have the planning support from a multi-generational team, that will be around not only for the rest of the client’s life, but generations beyond. His greatest professional satisfaction is helping make other people’s dreams a reality through financial planning.

Beginning as a college intern while studying at Marquette University, he joined Northwestern Mutual in 2004. Andy then joined Northwestern Mutual full time in 2006 after graduating with a business degree in Economics. Since then, he’s also earned his CFP®, CLU®, AEP® and RICP® professional designations. As a Wealth Management Advisor, he specializes in helping clients get to and through the complexities of retirement which includes investment portfolio design & management, as well as distribution planning.

Andy and his team also help clients with their life, disability, long term care, education funding, and other financial goals. In addition to these areas of practice Andy works with many physicians, business owners and estates to help with their unique planning needs as well. As a member of NAIFA (National Association of Insurance and Financial Advisors), and the Milwaukee Estate Planning Forum, Andy is committed to continuing education and bettering the financial planning industry.

Andy and his wife, Jenny, originally met at the Gesu Church meal program serving others. Now, many years later they reside in Fox Point with their three daughters and son. Andy and Jenny are members of St. Monica’s church, where Andy and Jenny are very involved. They enjoy spending family time together, exercising, entertaining, serving others, and spending time on or near the water.

*Forbes “Best-in-State Wealth Advisors” list (April 2024), Research and ranking provided by SHOOK Research, LLC. Based upon data as of 6/30/2023. Northwestern Mutual and its advisors do not pay for placement on 3rd party rating lists, but do pay marketing fees to these organizations to promote the rating(s). Rankings and recognitions are no guarantee of future investment success.*