

2019 Estate Planning Hall of Fame



Kate B. Leipprandt, CFP®, ChFC®, CLU®, is the owner and managing director of Baldwin Financial Advisors, LLC., a registered investment advisory firm involved in fee-based financial planning, consulting and education for individuals and small businesses. Kate specializes in helping her clients build, protect and sustain financial independence and has a talent for making difficult topics easier to understand.

Kate did her undergraduate studies at DePauw University (Greencastle, IN), earning a BA in Economics with minors in French and Psychology. She studied Economics as part of her undergraduate work at the Université de Strasbourg, France. She continues her work at DePauw by returning to the school campus to speak to the Women in Economics and Business students, and for the prestigious McDermond Center Speaker Series. Kate has recently been nominated for a Darnall Fellowship for her role in working to create opportunities for alumnae graduates.

Kate's was first published in 1988 when she was selected as a contributing author for Loren Dunton's book "About Your Future." In 2004, she had her first edition of a textbook titled the "ABA Financial Planning Workbook" published by the ABA. It is a resource recommended by the American Bankers Association (ABA) for trust administrators, private bankers and other wealth advisors to obtain their Certified Trust and Financial Advisors (CTFA) designation. Kate's most recent version was published in 2016. Kate continues to write, update the texts and teach the courses.

Kate has taught the Insurance courses she authored at the American Bankers Association's National Graduate Trust School off and on since 1997. She taught the 'In-Bank' Trust Schools (Financial Planning, Stock Options, Qualified Plans and Insurance) held by Wachovia banks in 2006. Other audiences for Kate include corporate clients Commonwealth Edison, InSpeech, Underwriters Laboratories, Northern Trust Bank and the First United Methodist Church of Arlington Heights.

Numerous financial institutions continue to utilize the systems, processes and tools Kate has taught in her presentations. She has also appeared as a spokesperson for a major financial services firm in national TV advertisements, as well as in *Business Week*, *U.S. News and World Report* and *Working Woman* magazines and other publications, including the Chicago Tribune.

Kate is involved with many associations including the CFP Board Women's Initiative (WIN)-mentoring women into financial planning careers; FPA Pro-bono financial coach to families in Chicago & for families fighting cancer; Chamber of Commerce; Endowment, Investment Committee & Preschool Board, event sponsor at local church; fundraiser and spokesperson for Sarcoma Foundation of America, Leiomyosarcoma Direct Research Foundation; FSP- Prior Board Member for Society of Financial Service Professionals; Parent Teacher Association Past President and prior Youth Soccer Coach; and mission work in the US and South Africa.