



## *Women of Associated*

### Sara Walker

### **Walker knows how to make Economics fun for all**

Sara Walker's job is not for the faint of heart.

Consider what a typical day is like for her, as Senior Vice President and Investment Officer for Associated Private Client Services.

"It normally starts with a look at the market and the morning's headlines, and then I spend much of the day talking with clients and managing their portfolios. Any spare time I can find is devoted to tasks such as strategizing business-development calls, planning client events, and researching and writing reports, presentations and speeches."

She enjoys the variety, she said. "The downside is that there are days that you begin doubting your sanity."

Fortunately, Sara laughed at this last statement. She laughs a lot, in fact -- not something you would expect of someone who spends much of her life poring over numbers. But then she is not what you would expect of someone who's considered the chief economist for one of the nation's larger banks.

### **Groomed for great things**

Sara's resume reveals that she's been preparing for this work her entire career.

It starts with her education, which includes a Bachelor's in Business, a specialty in Finance and a second major in Economics, all from UW-Parkside, as well as a hard-earned Chartered Financial Analyst designation from the CFA Society. (Just for fun, she recently embarked on an Executive MBA program at UWM.)

Her career didn't play out quite as smoothly, at least at first.

She launched it at another bank in Milwaukee. “I worked for the installment loan collection department,” she said, laughing at the memory. “I had to go into some fairly rough neighborhoods for this job, but fortunately I was too young to worry about it.”

The bank ultimately moved her into treasury management, back in the days when money-market funds were paying 15%. “I went from dealing with people who wanted nothing to do with me to working with commercial customers who were very receptive to what I had to offer. It was enjoyable, and it led me into ten years of managing investments.”

## A taste of self-employment

Next, Sara joined two partners in a start-up money-management enterprise.

“We were three investment geeks who knew how to manage money,” she said. “But we didn’t know much of anything else – not sales or marketing or managing employees or operations.”

They learned a lot, she said. But for her, it meant learning that she’d rather spend her time managing portfolios than figuring out how to file yet another report or repair a printer.

So although the business was doing well, it didn’t take much to coax her back into another banking job. And just a few months later, Associated called her. The rest is history.

## The right place

Sara seems exceedingly happy with both her work and her employer.

“People have good reason for being suspicious of the financial services industry, especially in recent years. It’s wonderful to be working with a team like ours at Associated, where we are totally oriented to doing the right thing for our clients – and where *our* financial success depends entirely on *theirs*.”

She enjoys making her clients happy by making their money grow. And she enjoys educating anyone who’ll listen about the joys of her profession.

“I love economics,” she said. “And I love helping people understand that it doesn’t have to be boring or scary, but is in reality a lot of fun.”

Because of her knowledge and her passion for the subject, Sara is often invited to speak at venues ranging from shareholders meetings to gatherings of various trade and professional associations. She’s also a favorite source for print and broadcast reporters.

## Beyond the job

There's more to Sara's life than work. She and her husband Pat Dhein and their three Airedale terriers live in the eclectic Brady Street neighborhood on Milwaukee's east side. She serves food to the needy through her church. She teaches economics and basic finance to high-school students through Make a Difference-Wisconsin. She's on the boards of the Milwaukee Public Museum and Lad Lake, a residential program for troubled youth. And she participates in local events such as the annual Brady Street Pet Parade; in fact, she chaired the Pet Parade for four of its ten years.

Still, work is never far from her thoughts. Even in her free time, she enjoys talking about it with others, especially those who are considering careers in financial services.

"One thing I emphasize is the importance of asking for help wherever you can find it. That may mean contacting someone you heard speaking at an event. I tell them not to hesitate. Most of us are happy to help; what better gift can we give a young person?"

Sara also has this word of advice for today's younger generations.

"Never underestimate the power of a handwritten thank-you note. In this day of almost exclusively electronic communications, such a note is appreciated, and you will long be remembered by its recipient."

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