



## **OPEROSE WELCOMES MICHAEL SHONE**

MILWAUKEE, WISCONSIN – August 28, 2025 – Operose announced today that Michael Shone, has joined the team as Director.

Michael provides advice to clients with respect to the planning, execution and feedback of their investment programs. In addition, Michael assists clients with overall financial planning, investment policy development, asset class assessment, investment management, and ongoing client support and service.

Prior to joining Operose, Michael was the Founder and President of Peirce Park Group, Inc. which was sold to Marquette Associates. Michael then spent several years with Marquette Associates, where he was responsible for providing investment consulting services to clients. After leaving Marquette, Michael was an independent contractor and Senior Financial Consultant with Clariti Wealth Advisors where he was responsible for providing investment advice to clients.

Michael holds a B.S. in Accounting and an M.A. in Economics, both from the University of Delaware, and has completed graduate work in Finance at Johns Hopkins University. In addition, he was a Certified Public Accountant, though his certification is currently inactive.

## **ABOUT OPEROSE**

Operose Advisors LLC is a Wisconsin-based investment adviser working in partnership with independent investment consulting firm, Marquette Associates, Inc. Our purpose is to deliver an institutional approach to individuals, families, trusts and closely held businesses with planning, execution, and feedback of investment programs.

For more information, please visit [operoseadvisors.com](https://operoseadvisors.com).

