



Excellence in Financial Literacy Education



The 2024 Wisconsin Governor's Financial Literacy Awards honors recipients in one of three categories: individual, organization, or legacy, for providing exceptional financial literacy and capability education in an inclusive and innovative manner to the residents of Wisconsin. Affirming the unique business model of Francis and their commitment to providing conflict-free and sales-free workplace financial wellness services, Wisconsin Governor Tony Evers provided three awards to the firm and its employees.

Legacy Award



Kelli Send, CFP®

SVP Financial Wellness, Principal, Co-Founder

Kelli's 30+ year career has been devoted to delivering financial education and personalized financial advice to the workplace. She has demonstrated a commitment and co-founded a business dedicated to serving all members of the workforce, regardless of socioeconomic status. From endless creativity for new educational campaigns to intentional 1:1 sessions with client employees, she has expanded the financial capability of thousands of individuals and their families.

Innovation Award - Organization

Francis

Francis has built a unique financial services business model designed to exclusively serve participants in employer sponsored, qualified retirement plans. This expert team provides conflict-free retirement plan consulting to employers and sales-free financial wellness services to employees. Instead of prioritizing high-earners, employees from all walks of life have access to their services.



Innovation Award - Individual



Matthew Vandre, ChFC®

Financial Planner, Director Digital Services

Matthew's contributions during his 13-year career delivering financial education is highlighted by his work directing Francis' digital services and management of proprietary fintech tools, like the Francis mobile application. His work has expanded workers' access to financial advice and learnign resources and simplified the delivery of Francis' services within the workplace.

About Francis: Francis provides conflict-free retirement plan consulting and sales-free workplace financial wellness services with offices in Milwaukee, WI, Minneapolis, MN, St. Louis, MO, and Los Angeles, CA. Our services enable our clients and their employees to achieve the Work-Life-Money Balance that leads to strong financial futures and more fulfilling lives. The team provides financial wellness services to around 150,000 employees around the nation. Visit FrancisWay.com to learn more.