Wipfli’s Financial Services practice team would like to recognize Mary Boortz for her 28 years as a dedicated associate, as she prepares for her retirement in June. Mary started her career in the Eau Claire, Wisconsin office on March 27, 1995, where she worked in HR & IT Consulting as a client services assistant. As the firm grew, she moved to working exclusively in HR consulting as the first senior client service assistant in the firm, which she did for 8 years. For the last 20 years, Mary has worked as the administrative manager (the first in the firm) for the Financial Institutions practice. A noteworthy contribution to the practice during her time has been the implementation of the FS University, which allows senior staff to network with one another while being educated by Wipfli leadership over the course of three days.

During those 20 years, she has had the pleasure of working with several outstanding industry leaders, including Greg Barber, Deb Marshall, Dave Hanson, Mark Harrison, JoAnn Cotter, Mike Vesel, and Anna Kooi. Many of the partners that Mary has worked with have nothing but outstanding things to say about her work at Wipfli. Industry leader and partner, Anna Kooi, reflected on her three years working alongside Mary, "Her remarkable 28-year career has not only left a lasting impact on our team, but on the clients of our financial services industry as a whole. Her extensive knowledge, unparalleled expertise, and unwavering commitment to excellence has set a high standard for all those who have had the pleasure of working alongside her. Mary has helped shape the financial services practice into what it is today, and her contributions will continue to benefit all impacted for years to come. We wish her a well-deserved retirement and thank her for the profound impact she has made."

In speaking of her time at Wipfli, Mary said, “I’ve enjoyed the fact that every day is different and being a part of the growth that the financial services practice has seen over the years.” When asked about her favorite part of being on the team at Wipfli, she stated, “I have been fortunate to meet a lot of people over the years, both internally and externally, and have made a lot of friends.” This can attest to how Wipfli has seen so many individuals, like Mary, who find long and fulfilling careers at the firm.

Mary currently resides in Eau Claire with her husband of 27 years, Tim Boortz. She has two children – Jim and Stacy, five grandchildren – Bryce, Abby, Zaira, Jetta, and Mya, and one great-granddaughter – Emery. In her retirement, Mary hopes to travel with her husband, as she stated, “[We] are hoping to travel after I retire. We both come from large families that are spread throughout the country, so [we have] many places to visit.” She also hopes to work on craft projects, one of her favorite hobbies.

Wipfli would like to thank Mary for her many years with the firm and wish her a very happy retirement.