

## Chris Wilbratte



**Chris Wilbratte** has 30 years of experience working with wealth management clients over age 50 to grow their investments and avoid retirement tax traps. In 2013, he partnered with Jim Morano, CPA to establish Echelon Financial. They have found their combined experience is ideal for clients who seek coordinated tax planning and wealth management services.

Prior to founding Echelon Financial and after spending some time with Fidelity Pension Services, Chris founded Quantum Pension Services. In that time, he grew the firm to over 30 representatives serving over 8,000 clients.

Chris received his BBA in Finance and Marketing from The University of Texas at Austin and considers himself a lifelong Longhorn fan.

In 2004, D Magazine recognized him on the “Top 10 Under 40” list for his achievements as an entrepreneur and for his philanthropic work in the community. Chris is also a regular contributor to Kiplingers.com on topics surrounding financial planning.

Chris believes in giving back to the community in time, talent, and treasure. He has been a guest speaker at both the McCombs School of Business and the UT Systems office and is frequently asked to speak at different colleges and prestigious industry events. In 2018, Chris and his wife even established a scholarship at the Canfield Business Honors Program at The McCombs School of Business in order to support high-achieving undergraduate students pursuing a career in business.

Chris has taken a leadership role in every organization in which he has been affiliated. In business, he served on the board of both the Dallas and Austin Entrepreneurs

Organization. In the nonprofit community, he and his wife chaired the Producers for the Dallas Theatre Center. He also served on the board of the Good Shepherd Episcopal School when his children attended preschool there.

His longest and most personally impactful service was for The Rise School of Austin.

The Rise School of Austin is a preschool where typically developing and delayed learners are given the unique opportunity to learn together and from one another. Chris saw the lifelong impact that the school had for both the students and their families and knew he had to be involved.

After supporting the school for one year, Chris was asked to serve on the Board of Directors and began a 12-year tenure during which he was Board Chair for 2 years. During his tenure, Chris and other board members raised enough money to build a new school, expand the number of classrooms, and guide the school to financially sound footing.

Chris, his talented wife, Brooke, and their two children moved to Austin in 2007. When he is not working, Chris spends time traveling with his family. He enjoys reading biographies, historical fiction, and fly fishing.

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