Jackie Wilke

Vice President | Advisor Consultant

Jackie Wilke is a highly requested and respected expert in practice management and business development.
She studies the success of forward-thinking financial professionals and enterprises, then delivers those proven processes as a keynote speaker, coach, consultant, and content creator.

Since joining the Advisor Consulting Group in 2015, Jackie has helped numerous financial professionals and firms build their ideal business with their ideal clients by focusing on Process, Planning, and People. Through discovery, she understands where individuals and teams currently stand, then leverages her passion, expertise, and innovative spirit to help them identify and achieve their goals with a tailored approach.

In a world of commoditization and democratization, she believes a human-centric foundation and going beyond the money is more important than ever before.

Jackie is dedicated to helping clients deliver relevant value through expertise and resources in areas including:

- Women investors
- Rising generations of wealth builders and holders
- Becoming the affluent family's primary financial professional
- Client experience (including the virtual/digital experience)
- Digital marketing and social media
- Content creation and marketing
- Events and seminars
- Maintaining visibility and presence with consistent proactive communication strategies
- Activating scalable, magnetic growth
- Integrating behavioral finance and leveraging psychology for better client outcomes
- Elevating the power of personal brands for professional distinction and growth
- On-boarding and integrating new generations of talent

Jackie is also the author of Insights & Innovations, a weekly blog that has been delivering "what's working" to the inboxes of elite professionals since 2019.

A graduate of Butler University with a BA in Spanish and Business, Jackie began her career with the First Trust inside sales team in 2011, where she was responsible for the distribution and product expertise of UITs and ETFs.

Firm Overview

First Trust Portfolios L.P. and its affiliate, First Trust Advisors L.P., were established in 1991. The firms provide advisory services and a variety of innovative financial solutions, including UITs, ETFs, CEFs, SMAs, Structured Investments distribution, portfolios for Variable Annuities and Mutual Funds.

At First Trust, our experience, history of innovation and diversity of offerings are all part of our mission and are the only way we know to become a trusted resource. Because we consider each financial professional and his or her customer integral to our business, and truly our most valuable investment, we are committed to their best interests. We provide exceptional resources that help financial professionals define goals, solve problems and develop long-term strategies to help their clients achieve their dreams and goals. We believe that this kind of leadership will provide the most fundamentally sound investment products and financial professional support available in today's marketplace.