

KELENE SKRYPEK

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MBKS Family Office

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- 2016 - Present: MBKS Family Office Partner Director, Senior Financial Advisor
- 2003 - 2016: Morgan Stanley, Associate Vice President Investment Management Consultant, Financial Advisor
- 2000 - 2003: Smith Barney, Registered Marketing Associate
- BA - Business Administration, 2001, University of St. Thomas, St. Paul, MN
- Series 7, 2001
- Series 66, 2001
- Series 31, 2011
- Insurance Representative, Life, Health, LTC, 2003
- Financial Planning Specialist Designation, 2007
- Portfolio Management Program, Morgan Stanley, 2014
- Financial Planning Education Program, Kaplan University, 2017
- Twin Cities 5 Star Wealth Manager, 2014, 2015, 2016, 2018, 2019, 2020
- Nativity of our Lord Parish, St. Paul, Endowment Committee Member
- Archdiocese of Saint Paul and Minneapolis, Board Member

During my 20-year career in the financial services industry I have been fortunate to work with families from all walks of life, small business owners and professional athletes. I really enjoy getting to know my clients, and I take the time to listen and really understand their needs so I can better develop customized plans to help them meet their goals. Working closely with their legal and tax advisors, I am a proven advocate for my clients' financial visions. Whether their goals are being able to retire early, developing philanthropic opportunities or providing for their children's education, my success is knowing that I have helped my clients achieve their financial dreams, whatever they may be.

I began my financial career as an intern at Salomon Smith Barney while finishing my degree at the University of St. Thomas. After graduation I spent fifteen years as an advisor at the firm which eventually became Morgan Stanley. Looking to do more with my approach of providing transparent advice with a complete wealth management plan, I co-founded MBKS Family Office in March of 2016.

Outside the office I offer my financial knowledge as a member of the Endowment committee for my local parish. I am also a current board member of the Archdiocese of Saint Paul and Minneapolis. My free time is spent with my husband and three kids at one of the local hockey rinks, baseball fields or at our favorite vacation spot - Piney River Ranch in Colorado.



The Five Star Wealth Manager award, administered by Crescendo Business Services, LLC (dba Five Star Professional), is based on 10 objective criteria. Eligibility criteria – required: 1. Credentialed as a registered investment adviser or a registered investment adviser representative; 2. Actively licensed as a registered investment adviser or as a principal of a registered investment adviser firm for a minimum of 5 years; 3. Favorable regulatory and complaint history review (As defined by Five Star Professional, the wealth manager has not; A. Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine; B. Had more than a total of three settled or pending complaints filed against them and/or a total of five settled, pending, dismissed or denied complaints with any regulatory authority or Five Star Professional’s consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through Five Star Professional’s consumer complaint process; feedback may not be representative of any one client’s experience; C. Individually contributed to a financial settlement of a customer complaint; D. Filed for personal bankruptcy within the past 11 years; E. Been terminated from a financial services firm within the past 11 years; F. Been convicted of a felony); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients. Evaluation criteria – considered: 6. One-year client retention rate; 7. Five-year client retention rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations. Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. Award does not evaluate quality of services provided to clients. Once awarded, wealth managers may purchase additional profile ad space or promotional products. The Five Star award is not indicative of the wealth manager’s future performance. Wealth managers may or may not use discretion in their practice and therefore may not manage their client’s assets. The inclusion of a wealth manager on the Five Star Wealth Manager list should not be construed as an endorsement of the wealth manager by Five Star Professional or this publication. Working with a Five Star Wealth Manager or any wealth manager is no guarantee as to future investment success, nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by Five Star Professional in the future. For more information on the Five Star award and the research/selection methodology, go to fivestarpromotional.com. 2622 Minneapolis-St. Paul area wealth managers were considered for the award; 591 (23 percent of candidates) were named 2018 Five Star Wealth Managers. 2017: 2304 considered, 836 winners; 2016: 4387 considered, 1690 winners; 2015: 2673 considered, 825 winners; 2014: 1931 considered, 844 winners; 2013: 2151 considered, 863 winners; 2012: 1256 considered, 624 winners.