



BRIAN GILLESPIE - Investment Analyst



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Brian joined Windgate Wealth Management in 2005 and is a member of the investment committee. He is a Registered Investment Advisor. He has more than ten years' experience in the investment industry. Brian is actively involved in idea generation for the firm's portfolios and contributes to the management of client accounts invested in the Blue Chip Portfolio. Prior to joining Windgate Wealth Management Brian worked for William Blair. He received his B.S. in Finance from Illinois State University in 1995 and his M.B.A. from Loyola University in Chicago in 2002.

Q: How has your career grown since joining Windgate Wealth Management?

A: The freedom and flexibility of working for a small firm like Windgate has propelled my career into more decision-making responsibilities. Previously I worked for much larger firms that had a more structured environment. The ability at Windgate to wear "many different hats" means there are always new challenges and opportunities. The camaraderie among the small number of employees promotes the sharing of investment ideas, often prompting spirited debates. This open dialog is key to ensure that we are constantly re-verifying our investment thesis and see a potential idea from all angles when seeking investment ideas for our clients.

Q: What is a Blue Chip Stock?

A: Although we recommend our clients practice sound investing, not gambling, the term "Blue Chip" actually derives from poker. The standard set of poker chips include white, red, and blue chips, with blue chips traditionally being the highest in value. The term "Blue Chip" was adopted by the stock market to indicate the largest, most reliable companies. These "Blue Chip" names traditionally have the ability to be profitable in both good times and bad. Think of companies like Johnson & Johnson or General Mills; these companies typically pay dividends and have a wide "moat" around their business, meaning that revenues are still strong even in poor economic times. Blue Chip companies typically won't provide the most exciting growth prospects, but they make up for it in consistency and resilience. Because of these qualities Blue Chip investing can be a great tool in a retirement portfolio, whether by investing in individual Blue Chip companies or gaining exposure to these firms via Mutual Funds and ETFs.

Q: What brought you to Chicago?

A: I came to Chicago just after graduating college in order to find work in the financial industry. In fact, I grew up in Decatur, IL and drove up to Chicago for a job interview and learned I had landed the job and was starting the next day. It was a quick move up to Chicago but I have lived here ever since. Living in downstate IL my family was always split between the Cubs and Cardinals. Since I had always followed the Cubs, Chicago already felt like something of a home when I moved here. My Cardinal-supporting family members seem to keep getting the last laugh, however... at least over the past 100 years.

