



March 8, 2019

**OCTOBER of 2003: I was their family's new financial advisor and they invited me to their son's 2nd birthday party.**

Perhaps it was just a courtesy gesture, but I went anyway, planning to stop by for a few minutes and take off.

Instead, I ended up staying for several hours!

It was that afternoon that it really hit me: my clients are **REAL PEOPLE** and they want to work with someone who cares about them personally, not just their finances.

That family party changed the way I looked at client relationships and I'm so glad it happened early in my career. (ps. we're now the wealth advisors for 5 different people I met at that party!)

After selling their business, the family moved from Southern CA to Miami Beach. Last month, that 2 year old boy was accepted into the business and finance program at Florida International University.

We sent him this sweatshirt as a surprise gift! His mom texted me that I've been a great mentor to him and he chose business/finance partly due to my influence!

That was pretty humbling to hear...to think that we helped them plan, invest and save for this moment was pretty cool too. I'm very proud of him! He has a very bright future ahead of him.

Our clients are like family to us, and the best part of what we do everyday is helping people reach their goals and celebrating their success with them.

If you'd like to discuss this and get a checkup done, schedule a brief **Goals Conversation®** with our team by visiting our [website](#) today - no cost or obligation involved. You may also click [HERE](#) for our google reviews.

