



Travel Agent vs. Travel Guide

July 1st, 2022

<<First Name>>-

Our family trip this summer was a week in Belize the first week of June. One of the excursions we did with our kids was "cave tubing!" We had lifejackets, helmets and headlamps and each of our tubes were tied together. Without the headlamps on, the caves were pitch black and the caves were full of bats.

In addition to all that safety gear, we had two expert travel guides with us! They've been cave tubing multiple times per week for over 10 years. There's no way I would've taken my family down the river in those caves without the guides. Experienced guides like these two are invaluable when navigating something difficult or dangerous.



Have you ever thought of the difference between a travel agent and a travel guide?

A travel agent is selling you something. A travel agent is on the phone with you, but not on the journey with you. A travel agent is making a transaction (for a commission) and then moving on to the next deal. A travel agent often has never personally experienced what they're suggesting or booking for you.

A travel guide, on the other hand, is right there with you on your journey. A travel guide speaks from personal experience, knows the trail and has been there so many times before you. A travel guide stays by your side until you've safely reached your destination.

It's alarming how many people take financial advice from the equivalent of a travel agent instead of a travel guide.

Ask your financial advisor if they have real personal experience in the areas you're seeking advice about: real estate investing, entrepreneurship, private equity, growing businesses, stocks, tax planning, etc. Make sure the person you're working with is a travel guide and not a travel agent!!

Hope you are having a great summer so far and getting to spend some time outdoors with friends and family!

Ps. Here is a GoPro shot of my wife Amber scuba diving with some sharks. On our snorkel and scuba excursion, we came upon many sharks.



If you are not our client yet and want to review your investment strategy and overall financial plan, simply [click here](#) to schedule a time to talk!

Schedule a Call

Sincerely,

Signature block for Chad W. Willardson, Certified Financial Fiduciary®. Includes a photo of Chad and his handwritten signature.

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