

## 6 Must-Have Qualities of your Financial Team



**Find your perfect match & maximize your wealth**

March 26th, 2023

Hello,

WHERE you get your financial advice from matters A LOT.


Over a 20-year period, the advice you receive influencing the decisions you make will be the difference between achieving your goals and squandering your wealth or opportunities to grow.


I've never understood how a high net worth entrepreneur making 7-8 figures annually is taking advice from an employee at a bank or an insurance company. In the same vein, I wouldn't want to seek parenting advice from someone who never raised kids, or fitness/nutrition advice from a trainer who is out of shape and has poor health habits.


**"Everyone has an opinion these days. Only take advice from people who are where you want to be!"**


If you're a high-net worth entrepreneur, seek advice from professionals who have experience and a successful track record as entrepreneurs.


### **Look for someone who:**


 Has experience: they have experience running a business (if you're an entrepreneur yourself). They have given great advice in the past to other wealth entrepreneurs throughout uncertain and volatile times, helping them make great strategic decisions.

 Is trustworthy: they're fully transparent regarding the costs you will pay for investment management, financial planning, and investments made on your behalf. They serve as your certified financial **fiduciary**.

 Understands your objectives and values: Your financial professional team should take the time to learn about your goals, concerns, values, and priorities. They should do more listening than talking. They need to show they care about what matters to you.

 "Eats their own cooking": they invest in the same kinds of financial investments they recommend. They're not taking risks with your money that they wouldn't take with their own money! That been said: Work with a financial advisor that will tell you the truth and not what you want to hear.

 Is independent and certified: they do not work for the same company where your financial account (or insurance policy) is held; They are not an employee of a big bank of a life insurance company that calls the shots. Instead, they sit on the same side of the table as you do when giving advice.

 Communicates proactively: they get back to you quickly, they answer your questions. They are happy to explain what's behind their strategies and willing to share potential upside AND downside of what they recommend. They are open to having conversations and not expecting you to have no voice in the process.

If you are a high-net worth entrepreneur with > \$10M to invest and are not fully getting everything on that list above from your current financial team, my **[PACIFIC CAPITAL](#)** team would love to talk to you.

**[CLICK HERE](#)** to schedule a conversation!

Sincerely,



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