



January 26, 2025

Dear [\[FIRST NAME GOES HERE\]](#),

This past week, we celebrated the grand opening of our new Pacific Capital headquarters...

And I'll be honest – I got really emotional.

Sometimes, the biggest dreams start with the simplest thoughts.

(And watching someone else's vision become reality can be exactly the spark you need to pursue your own.)

Back in 2011, when I left Merrill Lynch...

I had *no idea* what the future had in store.

All I knew was that I wanted to build something bigger and better for the clients we really loved working with.

Something different.

Something that genuinely aligned with **HOW** wealth management should be done for entrepreneurs and their families.

So, I set some pretty big goals for myself:

- Build a first-class wealth management team full of competent fiduciaries that put clients first.
- Buy a building and create the most beautiful office space in Southern California—one that doesn't feel like a stuffy financial office.
- Create a family office model to support HNW entrepreneurs in all aspects of their life and business.

Looking back now, my vision came true, but NOT because I had some perfect master plan...

But because I was (and still am) focused and obsessed with 3 things:

1. Striving for excellence in everything we do.

And I mean everything.

Our clients get 100% effort and responsiveness from our team, with no exceptions.

That's just how we're wired.

2. Focusing on growth and improving internally.

Growing. Improving. Breaking limits. Pushing boundaries.

Because your business only grows when you grow.

Our team is constantly implementing new ideas and working on being more valuable to our clients.

3. Hire and work with the absolute best in the field.

Why?

Because you can work yourself to death trying to do everything...

But you'll never reach the heights you dream of without the right people by your side.

That's why when it came to designing our new headquarters...

I didn't just want 'any' design firm.

I wanted someone who could take my vision and elevate it beyond what I could even imagine.

That's exactly why we partnered with **JTCPL Designs, a renowned design firm from Dubai and India.**



Ninad Tipnis (Founder & Principal at JTCPL Designs) and I at the new HQ.

They're world class architects and artists.

Masters of their craft.

The proof is in every detail you see in this office.

The beautiful new office you see right now...



The incredible team I have supporting me...

And the 100+ people who showed up last week to celebrate with us...

Wouldn't exist if I had:

- Listened to the doubts or given up when things got hard
- Settled for "good enough"

I have no words to describe **how grateful** I am for everyone who helped make this vision a reality.

This is exactly how I want you to think [\[FIRST NAME GOES HERE\]](#):

Your vision might seem scary or unclear at first.

That's normal. But if you:

- *Stay committed to growth*
- *Always strive for excellence*
- *Never settle for mediocrity*
- *Keep serving others at the highest level*

...anything is possible.



If you're reading this and wondering about your own big vision for your future, remember...

Every significant achievement starts with the first step of believing in something bigger.

Same principle for investing; you've got to believe the future ahead is going to be bigger and better. *📈 📈 📈*

To your ELEVATED success,

Chad

Want more insights on turning visions into reality? Check out my latest article in [Executive Function Magazine's January 2025 issue](#). On page 51, I dive deeper into the proven strategies that help business leaders like you clarify their vision and drive lasting success.



P.S. If you're an entrepreneur with \$10M or more in liquidity and want to make your money work even harder for you—[set up a call with my team](#), and let's explore new ways to make that happen.

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