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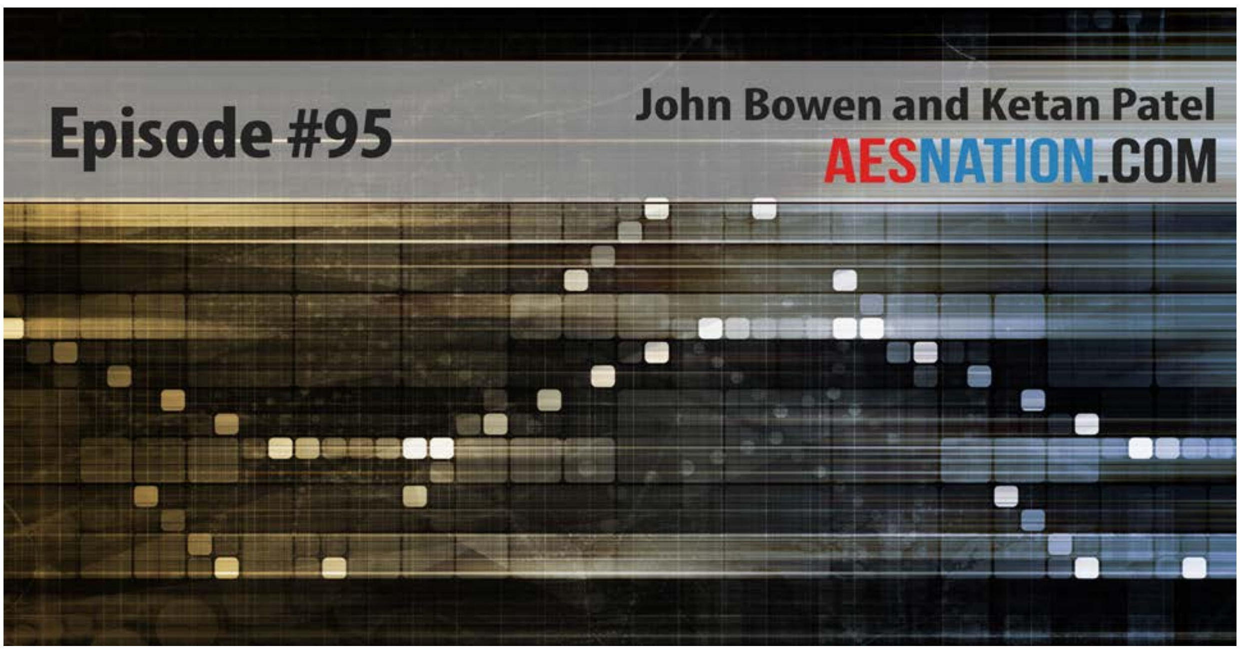
EPISODE
95

Ketan Patel

Show Notes at: *http://www.aesnation.com/95*



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Best of success,

John J. Bowen Jr.

John Bowen
Co-founder, AES Nation

John Bowen: As entrepreneurs, all of us want to go out and make a difference. We're working really hard, we're charging ahead, but to do that well, we've got to make the right decisions. How do we make the right decisions? We've got to frame it and we've got to have great data to pull this together. We live in a world of abundance. If we make the right decisions, we can deliver huge value for our clients and do extremely well by doing that. I have someone who specializes in that area today. He's a serial entrepreneur and he's made his whole career about using data to make businesses even more effective. It's what everyone of us wants to do so that we can accelerate our success. I'm John Bowen. We are at aesnation.com, stay tuned. You'll be glad you did.

Ketan, I am so excited to have you. You and I met at Abundance 360. I was blown away with some of the comments and thoughts that you had during the meeting. We got talking about different things and ran into each other at the airport. I go, "I got to share your insights with our audience." First of all, thank you for taking the time today.

Ketan Patel: John, it's my pleasure. Thank you for having me. It was amazing to see the evidence of abundance that Peter was showing before every session and it makes things that are otherwise unbelievable believable because you see the evidence in the form of data. I'm looking forward to speaking with your audience about data and the role it can play in helping make better decisions through businesses. Thank you for having me.

John: It is great. Let's go in. I don't know, as a child, how you woke up and you wanted to ... I don't think you said, "I'm going to be a serial entrepreneur and I'm going to use my understanding of data to build great businesses." How did you get to where you are today? I mean, because you are truly a successful serial entrepreneur.

Ketan: My dad was the first educated person in his family, so education was very important to him, and therefore, it was important to me. I spent my high school being very successful as a student and then going and getting an engineering degree from John Hopkins, and doing some graduate work from Boston University in Computer Engineering. When I got into the workplace, I realized I wasn't a very good engineer. What I started seeing was these engineering principles, whether it's a flow diagram or a circuit, the principles that apply to engineering apply to business.

Most of my career has been using engineering principles and problem solving techniques in business. The trick there is to find the right data, find the right current for circuit diagram, or the right fluid for a flow diagram. I've had some success with that across multiple industries. I did that as a consultant or as an employee for the first half of my career and then decided I was done working for other people and started my first company about 20 years ago, haven't looked back.

John: It's funny where we start out. I started out as a pilot in the Navy and I thought I wanted to be a pilot, and then I found out I really didn't like flying. I had some skills that were learned during that way that really using the Math and engineering background and finance to get into financial services and make a difference. This is a journey we're all on and as serial entrepreneurs we're doing. I want to go to some of the lessons you shared. I'm going to go a little out of order than what we talked about in the pre. I think this will fit better is, you know, you talked about systems. So many of the entrepreneurs, and usually the number one thing we all focus on is the client experience. We get going and we're good technicians, we're good engineers, we're good financial people, we're good widget makers, whatever it is, and we really get focused on the client experience. The client experience is so important but oftentimes, we neglect the business model.

Ketan: Yeah.

John: This is not limited to somebody in a start-up. I see it over and over again that people have successful businesses but they limit their ability to deliver and magnify that value because of the business model. Share with us some of the experiences that you've had here.

Ketan: Playing on the earlier examples I said, oftentimes, I encourage entrepreneurs to spend as much time on the business model as they do on the product service offering and the client experience. Using my analogy, it's one thing to build a pipeline. You better make sure there's fluid going through the pipe at the end of the day. If you're going to make the best circuit on the planet and there's no current going through it, you're going to be in trouble. In many ways, they focus on the design of the circuit or the pipeline, as if the current and the oil are abundant.

In some cases, they aren't. It's important to know what you're bringing over so that the currency of business which is the business model, is as important as the solution or service or the innovation that you're offering. I think many times, entrepreneurs miss that and especially engineers. What happens is, if they start to struggle with sales, they say, "Oh, I need a better product," and oftentimes, it's a better understanding of their business model or their customer to see the value chain correctly. I encourage entrepreneurs and executive teams to spend as much time, no more no less, but as much time on the business model as they do on the product or offer strategy.

John: Yeah. I think many of us think of it as the better mouse trap. If we have a better mouse trap, that's going to be enough and people are going to flock to us. With all the noise in the marketplace, no matter where you are as an entrepreneur, what you're bringing out to the market, there is more noise than ever before and there are more choices. Not only do you have to differentiate yourself, but you have to be distinctive in your message to get out there. Then, I see it all the time where entrepreneurs, they've got a great solution. I mean, they really do have something, but they haven't spent the time to create the systemic way of attracting the right customers or right clients to them.

Ketan: Yeah. Another example of that is in how you market things. The same product or offer will resonate differently to different audiences. This is where behavioral marketing, which I've been a student of for most of my career, comes into play. If you're making an offer to a CFO about your product, you better focus on how it's going to save the money. If you're making the same offer to the Head of Operations, you better focus on what the efficiency gain from an operational perspective is.

If you're speaking with their IT group, you better talk about either how great the technology or how there aren't a lot of risks with it. Understanding the audience and their perception of the information will nuance the message that you lead with. Also, how you structure the offer can change based on who the primary signatory is. If you're selling to a CFO, it's a very different sales process than if you're selling to the Head of Marketing. Understanding those behaviors becomes as important as the differentiators in the product or the offering itself.

John: Yeah. What I find over and over again is, it's getting the ... Understanding exactly what you're saying is get that understanding of who your market is, who's the niche that you're serving, and then also get clarity. We get caught up in all the processes we put together, our own solution. You really are not selling that solution, you're selling the results, the end results. That's going to be different as you've mentioned. Whether it's the technology, the CFO, the CEO, everybody's going to want something different and this is so important. Let me take a step in the next one that we're talking about earlier, and it's raising capital.

We were at a capital raising meeting, we were at Abundance 360 and we started talking and some of your comments got me interested in reaching out to you to explore potentially getting together today and share your thoughts with aesnation.com, because as entrepreneurs, raising capital is something that's interesting. We see it as when we're getting started, something that we want to do because we need the capital to get going, but for this interview, I mean our podcast, we're at the $5 million, we're looking usually at successful entrepreneurs who already got a good business. It's not start-up capital, but they're looking at maybe taking some of the chips off the table or getting some money so that they can accelerate their growth. You've got some experience raising capital and the good and the bad. Maybe share with our fellow entrepreneurs from your perspective.

Ketan: I'll start with the story. My first company, we were profitable, about $300,000 a month in revenue over $200,000 in profit, when we became interesting in terms of raising some capital. We ended up raising some money just to cushion potential downstream because there was a cash flow differential when we've got paid and when we had to pay out certain things, so we wanted a little bit of a cushion. Raised $600,000 for a minority stake. We focused on valuation. What we missed were some of the covenants that came with that valuation. While that 600,000 never left the bank because we were profitable already, they had more control of our board in terms of veto rights and how we could exit the business, than the three founders put together that owned the majority of the company. That was an interesting lesson.

At first, coming from the entrepreneurial side, that presented some problems. Now, having gone into it as an investor, I see the wisdom of the way that money structured that deal. The reality is, for entrepreneurs, if you're going to raise capital whether it's a dollar or a hundred million dollars per 1% equity or 51% equity, from a fiduciary perspective, from a responsibility perspective and from a liability perspective, you have lost control of your company. Now, if everything goes well, you can still make decisions and things, but you have an obligation to that money, that means it's generally the recourse of last resort. So, if you are making money and profitable and you don't have a very clear use of this capital and how it's going to affect your valuation, I would say be very careful about seeing only the money in your account as the consequence, because capital that's put to work in that way has rights and it comes at a price.

It is usually, especially venture capital, is the most expensive money out there. Yes, it validates you, yes, it creates access to a network of people, but really look into the details of the other side of that equation because it's not just about the money you get. If you don't have a reason to use that money to grow the business, if it is to take money off the table, for example, there are probably other better ways to do it, maybe through dividend distribution or other things that would allow you to continue to do what got you there. I mean, at 5 million, you're successful. You've gotten further than 99% of the start-ups that are out there. Really, you're attractive in that position, so be careful how you raise the money and what the use of that money is for.

John: I'm going to go ditto that to having been raised ... I've been on both sides of the transactions many times now and it is really an issue that you want to be extremely careful about because it's enticing as you have traction and people will come to you and want to invest with you. I still remember a single digit percentage owner when we're selling a business that was very successful. They got a good return on investment on their capital and they had had something. There is part of the agreement that we didn't understand, that they could have held the deal up. A matter of fact, they did, and we had to threaten legal action at that time, and it was ... It's just not ... When you're trying to sell to somebody, to have legal ... The buyers aren't overly excited entering into a lawsuit. Be hesitant. On the other hand, I've raised capital and we've really grown. We created all kinds of liquidity and there was a reason to do it. There's a right and wrong part, but I do like the whole fiduciary thought that you mentioned.

Ketan: Yeah, and this is the thing, it's not one-sided, it's not the entrepreneurs that take an advantage of the capital. As a fiduciary, you have to protect the money. When I've gone and invested in other people's companies, I asked for covenants that I would never accept as an entrepreneur. It doesn't make me a hypocrite, it makes me accountable to the money, right? If I'm going to ask somebody to put their money behind a venture that I'm backing, I have to have the ability to control the outcome for the protection of the money. I need to have a seat at the table. This isn't a right or wrong issue, it's just recognize that it's as much of a partnership as a co-founder or as a spouse, and the most important thing is, you really want to find a partner that is philosophically aligned with your goals and not just look at the terms of the money.

Generally, if I'm aligned with the person, I will not be the best deal they have, but in the long run, I will be the best deal because my understanding of their goals is going to help them reach them as opposed to putting myself in an adversarial situation with them. Same on the investment side. I don't want to invest in an entrepreneur start-up that isn't aligned with the principles of the data-driven decisions, eating what you hunt, getting the revenue quickly, putting as much energy into the business model as you do into the business. If you're not willing to do those things, I'm not your guy. It is a match.com exercise, you want to find the right investor for you and a large part of that has to do with personality and alignment of values.

John: Again, this is something that I see over and over again when we're putting together deals. When I've sold a few business along the way and then for a while, I was part of a senior team where we did 28, fairly significant acquisitions, and as a knowledgeable buyer, we do a fair amount of M&A work in the financial services side, you want to think of whichever side you're on, if something is properly papered, we're talking about fiduciary, but what's happening is, if they write the agreements well, they're going to force you to be at the table no matter whether it's the investor or the entrepreneur. You got to take these things seriously. Force you to the table means you can't take any major action without everybody at the table being in agreement. One of the things as entrepreneurs, you've been an entrepreneur, you've been an investor like I have as well, and I don't know, as an entrepreneur, I don't want to give up control of that decision making from my senior team unless you're somebody really aligned with us. This is such a big deal.

Ketan: Yeah. That's a great point. It's not really about whether you give up that control. It's that, if you're going to shift from singular control to group control, make sure that people in that group are aligned with your principles and your goals, the goals of the company. That's the other thing that sometimes happens with entrepreneurs. There an ego factor that doesn't apply, right? I mean, I tell entrepreneurs, "Think of the company as your child. You want the best for your child, but you are eventually going to let that child grow up and go into the world, and be the best that it can be." Even if you don't recognize it, your job as a founder is to be a steward and to eventually relinquish control. You want to have the mind-set of raising a child, not, "This is about me and my ego and my company, and without me, it's useless." A lot of times, that's the difference between a lifestyle business and a sustainable business.

John: Yeah. This is something that I'm going to encourage everybody that's watching the podcast or listening to the podcast to think about it. What do you want? Because there's no right or wrong. You can have a lifestyle boutique or you can build an enterprise, but they're very different and they're different animals. You're going to have different strategic partners along the way and it's important to be doing it on purpose. Be really clear on this. One of the things that is unique to your skillset is data. I want to go...

When I'm looking for financial markets that is really data intense, there are times that I could push a button and move a billion dollars, and just the data I love. I wasn't that data sensitive in business and over the last really several years, I become extremely... The ability to measure everything, technology just improved so much with bandwidth with the cloud services, with just the processing power. It's amazing what you can do. What I'd love to hear from you is how you see your fellow entrepreneurs really leveraging data to make informed decisions that help their businesses be more successful.

Ketan: The internet definitely changed a lot since. A little bit of background. Engineering principles apply to business data, so I've had success in telecom and the automotives where we created a visibility application for the entire supply chain without violating any negotiating rights, did it in the media industry where we created spot demand markets for television and radio which actually is a spectacular failure because the market wasn't looking for that data. There's a big difference between data and information. You don't need a lot of data to make a decision. You need the right data. The challenge is looking for the right data and it's very easy to get into the position where you're manipulating data to see the outcome you want. The key to avoiding that is what I call telemetry data.

An example of telemetry data is your heartbeat. Your heart is beating and it lets you know you're alive, but to a doctor or an EKG, it can tell you whether you've had a heart attack, whether you're under stress, what your rate is, whether you're about to have a stroke, if you've had a stroke. All of these things, just for measuring that electronic signal. It's the knowledge of the pattern that makes that data useful and actionable. As businesses, there are not a lot of patterns that we can look at. Most of my career has been really focused on what's the pattern. Let's start with customers because all of your listeners have customers. It's looking at those customers and saying, "Okay, from a behavioral perspective, how are they grouped?"

According to the Eisenberg Brothers FutureNow, there are four categories of buyers. There's methodical, humanistic, competitive, and spontaneous. The methodicals and the humanistics need a lot of information before they make a decision, and the competitors and the spontaneous need very little. They make very quick decisions. The methodicals and the competitives use logic, and the humanistics and the spontaneous use emotion. If you know just that, and you know that your easiest value for your offering is logic-based and takes a while to explain, your primary buyer is going to a be a methodical. Nine times out of 10, I'll see is that your marketing is oriented towards competitive or humanistic, not your primary thing.

This is one application where you can take the existing data you have, analyze it, and there are plenty of people that can help you do that, and look at it from an alignment of customer value to your product benefits. In that alone, I've usually been able to double people's conversion rate. Very different conversation when we're thinking about satisfaction. How you can manipulate these things or at least understand them so you can find your best customers, that's the other thing that often happens is these businesses' best customers are the ones that they ignore. The ones that pay every month, that pay a premium, that never fight with the month price, never want freebies. Those customers, because there's no feedback group for them, are the ones that get ignored. That's one example of how data can help with the business model and the sales process.

With technology, data is available in all of these industries. My current company, Naya, focuses on energy. The reason is, the Internet of Things helped us made a beachhead of new data being made available in that arena. As you look for new opportunities, the mobile phone industry created a whole world of data. Twitter created a whole access to what's trending. It's a much better read of what's getting mind share than the newspaper used to be. All of these things become important. They also can be overwhelming. Its not just about data. Its patterns in data that make it easy for you to make decisions.

Once you have the patterns, trust the pattern to make the decision and then no matter how much data you get, I don't think the answer is going to change. Don't continue to analyze the same data over and over and over again hoping for a different outcome. In fact, one the slides we had at Abundance 360 showed this perfectly well. As soon as your number of data points gets to about a thousand, you have enough data to make a 90% probability answer, and then it doesn't change whether you get to 10 million. That large number theory applies a lot to data.

John: I do quarterly surveys of different areas of financial advisors. I do one a year of entrepreneurs, and then another in the affluent side. I'll tell you, it's just ... What you're saying just so resonates because we see over and over again the ability to understand our clients well, the data. An example, financial advisors were interested in working with people with money, surprisingly. We define affluent as someone with a million or more financial assets. We found that 84% of them wanted to connect emotionally first and then justify through logic the engagement.

What did the financial advisors all want to do is they wanted to convince people how they could make smarter decisions about their money and they were armed with great insights and could help, but when they saw the data, I mean, our coaching clients, it's just so much more successful. On average, over 35% growth each year by just doing that. I mean, we can go on and on, examples of data, but this is, I think at every single business, if we can understand our clients, I love the ... Looking at our existing clients and Pareto principle for most businesses, 20% of our clients are going to generate 80% of the profitability, but what do we do? We ignore them. Well, boy, having a campaign to really engage them in the business and then ultimately, depending on your business, to introduce you to other like-mind people can be huge. We see that over and over again. I love data.

Ketan: There's another application for your $5 million listeners and up. You're now in the growth pane, you can't do it all yourself, so you need a team. What you'll find is that team, sometimes comes to work with an emotional basis or political basis and start to see what politics have been and with success, you start to see some of these problems. Data is the great equalizer. If you managed through data, it becomes very easy to set up a ROWE, results-only work environment, and to create a structure where it's not about who's my favorite person, it's, what does the data say? Weaving this all the way back to this fiduciary responsibility we have to the company, you're now being a good steward of the company and it's not so much about your personal desires and what you want or what any particular vice president or direct report wants, it's, what does the data say is the best for the company? Not to the exclusion of your instinct, your intuition and your judgement, but as a complement to it.

John: One of things, without data, it's easy to get political and even pick your favorite person. I think marketing where it's a little harder to measure sometimes, you put your finger up in the air and test the wind and say, "Hey, this is working." With data, it's really obvious. Then the other part is, you can do split test on so many things, so instead of debating it endlessly around the table, let's try both with today's tools.

Ketan: Yeah.

John: Let's go then back at the first segment here.

What would you want to recommend to your fellow entrepreneurs is a book that you've recently that you think would help them be even more successful?

Ketan: I read a lot. I'm ion a lot of planes, so I listen to and read a lot of books. The one that I keep coming back to for zero to one entrepreneurs is the Art of the Start by Guy Kawasaki. It's an easy read. It isn't complicated in terms of analytics, but there's some great truths there. When you're at a stage and plateauing, the one I like is really Waiting for Your Cat to Bark, which is about better understanding of how to connect with your customers, understand the persuasion architecture and implement it in the digital realm we all live in. The first book is, how to make quick decisions, because I think one of the keys for entrepreneur is we're always getting ideas and one of the most important things to success is the idea is not to follow up on. Its how quick can you get to a no.

I think the Art of the Start does that very effectively. It gives you very simple guidelines that lets you know if this is worthy of your time. Then, Waiting for Your Cat to Bark is a marketing lens on what is considered, in my opinion, the best way to do anything in terms of digital marketing which is the persuasion architecture from the Eisenberg Brothers and FutureNow. It's worked for me time and time again. The principles of Waiting for Your Cat to Bark is really back to test, understand your data, understand the personas of your audience, and then tailor your message to be natural, fully digestible by the personas that are mostly like to buy your product. It's fascinating because we're so often wrong when we go with our gut, and I think this is a good way to check that.

John: I love the title. Let me put it up on the screen. I will be downloading it very quickly after. I have not read this book before. Waiting for Your Cat to Bark?: Persuading Customers When They Ignore Marketing. I can tell you almost all customers ignore marketing. This is a wide range of problems for all entrepreneurs. Look forward to a good read. Thank you. We'll go to the next one. This is resources. Let's go to your website. You've talked about poten- ... Actually, excuse me, I skipped one. Let me go to the one that I want to do is your applications for the day, the smart phone. You had one that's ... We were at Abundance 360. I don't know about you, but I picked up a whole bunch of business cards, how would we get those into usable data?

Ketan: There's a story and there's the answer. The answer is, I use a product called CamCard, which is a card capture app on your phone. The thing I love about it is its recognition. If I pull up this card, the card on here, I don't know if you can see that, but it can read all types of cards and I've had success with Chinese cards, with Chinese characters, as well as Spanish and English cards. The nice thing is, I take a picture of the card, actually, I don't even take a picture, I hold the camera over it, it finds the edges, takes a picture and it's very good at collecting the data off of the card and standardizing it, and then it syncs to the cloud, and from the cloud, it appears instantaneously on my iPhone and in my Google accounts and everywhere else.

For me, there were two problems. One, what do I do with all these cards and then where do I put that contact in? Is it in my phone or is it here? As great as Apple is with integration, Apple and Google don't play well and our mail server's with Google and our phones are typically iOS. I struggled with that problem. If you are using any customer relationship system like Salesforce or we use Sugar, we've actually been able to export and send these things into sugar as well. When I identify the type of prospect it is, across one of my businesses or for investment opportunity, I can get better about loading that stuff. It's nice to see the card visually because there are times where you ... It actually shows you their address on a map, so you can click, one click per direction. Personally, this has worked well for me.

Now, the story, which is, I've been struggling with contact management ever since I let go of Outlook back in 2007. That had to do with multiple emails, multiple businesses, trying to segregate that information. I had an assistant who is from Brazil. Didn't speak a lot of English, but was as connected to her phone as anyone I've ever met. I gave her the task of finding me the right app for this. She must have downloaded and tried 40 of them. This is in the course of a week, less than a week, she's doing all other stuff, and she came up with this one which is not one of the more popular ones, but it worked perfectly in the fact that she needed the multi-lingual piece. It was one of those lessons where if you let somebody run with the project as they see fit, oftentimes, they'll think of things that you hadn't. A little shout out to the idea of being a steward as opposed to a micro-manager. I didn't give her any real parameters and she far exceeded my expectations. Thank you Patty for that.

John: That's great. Let's go to resources. One of the things that you're doing right now in one of your businesses is on energy. When we think of cost, energy cost are often times substantial for some of our businesses. It's significant for everyone. What do you in there? I'm going to put up your website in this energy as well. Tell us a little bit about that.

Ketan: Remember, my background's in data, so why am I in energy? It's because energy has become data aware. With the Internet of Things, IoT, devices have an ID and they can do certain things to connect with the cloud. What it creates is an opportunity. I found this hardware company, Akida that we partnered with, that measures very precisely how devices use electricity. They do large power devices as well as small power devices, but this is not the home automation level, its real power consumers. Imagine sticking something on your air conditioner that can sample how it's using electricity at the frequency of which alternating current is going, so 500 times a second, you're getting data and you're seeing how alternating current is used by an air conditioner.

When you see changes in that pattern, something changed. With our pattern recognition system of Naya, what we've been able to do is start to identify patterns that tell us, "Oh, this air conditioner is sick. This air conditioner has a bad $3 capacitor and it's using $100 in extra electricity a month." When you explode that out, times thousands of devices, you can make a real difference. That's one side of the problem, which is monitoring the health of energy consuming devices using the equivalent of the heartbeat of electricity.

Then the other side is, how many people here are getting electricity bill and actually know how they're being charged for electricity. I'd be surprised if any of your listeners do anything but just pay it, because we think, "Okay, we got to pay for it and there's no choices, so we just pay as a blind item." The reality is, if you understand how you're charged for electricity, and Naya can help you with that, and you understand how your devices are using power, you can optimize that system to the tune of anywhere between 10 and 40 percent in actually reduction of energy cost. Some of it's in usage, most of it is in knowing when to turn things on where energy is cheaper. Then you also get benefits in terms of maintenance cost.

If instead of having to go and check an air conditioner everyday to listen for the bearings to be out of whack and know that it's in trouble, if I had Naya monitoring the system, I would get an alert every time there was a change in the pattern, and some of those alerts would be meaningful and others would not. We offer that as a service and the more data points we collect, the more we get smart about the patterns and we surface only the problems to the appropriate people. Maintenance request would go to maintenance, opportunity for a different rate plan would go to the finance department, and through that process, we're able to realize significant savings on electricity cost.

John: This is great. I mean, it's a super application of what you're talking about on data. The power of technology, the world of abundance that we live in today, it's really allowing us to do things so amazing. You're making it happen. Let me go to the last segment my key takeaways. I want to walk away with three major ones. The very first one is our focus. It's so important. You got to do two things really well on business. Number one is you've got to have a great client experience. We talked about it at length, that the need to really think through a business model that we can scale up and systematize it. Particularly, if we're having success but we want to go to that next level or skip a few levels, this is so important to make time to work on the business. Ketan, you suggested that we do equal weighting on both. I agree.

Second thing is, raising capital. This is a serious issue. Most entrepreneurs spend all the time on valuation and we forget the consequences of having capital that need to be a fiduciary. We don't want to go in lightly, but when we do need capital to really accelerate our success, we've got to have the right strategic or certainly financial investors that are aligned with us. Then lastly, we heard a whole bunch of discussion on data. No shortage of data everywhere. We want to take that data, make it into knowledge, get real understanding of the KPIs so that we can go ahead and make the right decisions.

As entrepreneurs, we've got to take this information and go out execute. Great insights. Ketan, I really appreciate and I'm going to encourage all our fellow entrepreneurs, go to website. You can see right above me, aesnation.com. Go there, we're going to have the transcript, we're going to have the show notes, all the links of everything we talked about. Go out, share this information with your fellow entrepreneurs, but also execute. Your clients and your future clients are counting on you. We wish you the best and success.

A Second Opinion on Your Finances

A Complimentary Service from Financial Advisor Select for the Members of AES Nation

Dear Fellow Entrepreneur,

Like many members of AESNation, I'm a serial entrepreneur. In addition to co-founding AESNation, I'm the founder and CEO of Financial Advisor Select, a firm dedicated to helping successful people make informed financial decisions by introducing them to top financial advisors.

If you're like many successful entrepreneurs, you and your family already have a relationship with a financial advisor. You may even work with several financial advisors. If you are completely satisfied with these relationships and confident that your finances are on track toward helping you achieve all that is most important to you, we congratulate you.

However, you may not be entirely satisfied. You may be wondering if there's a financial advisor who is better-suited to address your family's very specific financial challenges. If so, you are not alone. In today's uncertain economic climate, many successful entrepreneurs are wondering if they have the right financial advisor.

To help you find out if you are currently being served well, Financial Advisor Select is offering a complimentary second-opinion service to all qualified members of AES Nation. Simply contact us to schedule an exploratory call with one of our personal financial concierges. We will introduce you to a financial advisor who we believe has the ability to address your particular needs. The financial advisor will then meet with you and provide you with a second opinion on your finances. There is absolutely no cost or obligation to you.

Find out more about how Financial Advisor Select can help you and your family.

Why do we offer this service? Because at Financial Advisor Select, we have just one purpose: to help successful individuals and families achieve financial peace of mind by connecting them to top financial advisors in their communities. We look forward to assisting you.

Best of success,

John J. Bowen Jr.

John Bowen
Founder and CEO
Financial Advisor Select