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EPISODE
99

Lee Brower

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Episode #99

John Bowen and Lee Brower
AESNATION.COM

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Best of success,



John Bowen
Co-founder, AES Nation

John Bowen: As entrepreneurs, we're all about really delivering great value so that we can receive value. That's how capitalism works. Building great wealth by doing well by our clients. But there's some challenges there. How do we use this wealth effectively with our families to build great families? Entrepreneurs aren't always known to do that.

I have one of the top coaches in the world who's going to be joining us. He's led over 600 workshops. He is an expert in empowering families through wealth. Started his career just a little bit before me, we were just comparing notes. More on the estate planning side but saw all the opportunities that were being missed. He's created tremendous buzz. He's even featured in "The Secret". The book that sold over 50 million copies. You don't want to miss this. Lee Brower will be joining us in just a second. I'm John Bowen. We're at AESNATION.COM. All about accelerating your success. Stay tuned.

Lee, I am so excited to have you here. You and I have known each other for a long time. We've been buddies in the hall, we always stop, or in restaurants and that, different meetings and so on. I've never really gotten able to get deep into all the impact. All your clients are telling me Lee, you got to talk to Lee because he's making such a difference and he's so creative, so innovative.

First of all thank you for joining us today.

Lee Brower: Thank you John. I feel likewise you know. Now that we get a chance to know each other better I think that's a real blessing for me.

John: My side as well. Let's make it for all the entrepreneurs that are joining us for this conversation. What I want to do Lee, you're making some big inroads to helping people deal with wealth. As entrepreneurs we know there's high concentration of successful entrepreneurs who are building great wealth in how we can really make it even more effective. I want to get a little of the back story first. How did you get to doing what you're doing now?

Lee: I came out of college and chose between playing football or getting into the financial services industry and felt like my body would be better served if I stayed in the financial services industry. I started working with a firm in Los Angeles called "Financial Industries Corporation" and they were the largest fee based firm in the United States. I was immediately, you might say attracted to the area of estate planning. This firm had the who's who and I was like a kid in a candy store because they had Dean Martin, they had a former president of the United States as a client. I could technically say I worked on their estates but the reality was I carried the files into their office.

John: That is working on the estates here. It's heavy lifting.

Lee: Correct. You know as time went on I had a deep passion. I would actually go to probate court with an attorney friend of mine every Friday just to learn more. As time went on and I developed my own practice and it grew nationwide, I began asking myself the question, "What is my stewardship responsibility to my wealth and when does it end?" When I asked that question and looking around, I said, "Wait a second. If we're such hot estate planners, why is it that 97% of family wealth does not survive that third generation? Aren't we smart enough?" When I asked...

John: Well Lee...

Just to get everybody to join us because this isn't something... you and I grew up in the late 70's becoming financial advisors. I went out... same journey. I was more focused on the investment side but I did get my Master's in tax. I did a lot of the estate planning. Ultimately I was in sports and entertainment in L.A. for a couple years as CEO of a firm. I had 600 high profile clients.

I saw over and over again, between the high tech people I've work with and so on that that multiple... as you go one generation, two generations, three generations, things fall apart. Boy that statistic you just shared, 97%, I want all the entrepreneurs who are with us today. 97%. You wanted a good story. You're working unbelievably hard building this wealth. Making a difference in the world. You wanted to take care of your family but, boy this can create a lot of dysfunction along the way. They just want that 97% to really resonate with all of us because its a big problem.

Lee: It most certainly is John. Wouldn't you agree, they used to always say shirt sleeve to shirt sleeves in three generations. Lately with some of the sudden wealth that I'm seeing in families, it's happening in two generations. I think if the second generation has the opportunity to see how hard the first generation worked, they have a better chance with the money. When you don't even see how hard somebody worked to get their wealth then it makes it extremely difficult.

I fell into this, I don't know if its a state of depression, but it was like am I in the right business? I actually considered, I started taking courses. I was going to back and get a degree and become a doctor of medicine. Along the way I asked a different question and when the question was asked I started getting different answers and I realized that we can make a difference with these families.

Over time I left the financial services field, probably most recently just in the last five or six years. Completely left. I phased out but then completely left it and said,

"We're going to focus in on family leadership and developing that family leadership." That's how we've evolved to where we are today with empowered wealth.

John: That's great. This is why I wanted to have you on Lee is that we talk about leadership in companies. It's just so important to have the right leadership. Where we've got to inspire our team to make smart decisions about the business so that we can deliver great client experiences. We've got a scale it up, we've got to put the systems in place. We've got all these moving parts. As entrepreneurs sometimes we're so busy that we neglect it in our family. This is one of the reasons why that 97% happens. What do you mean by family leadership and how do we as entrepreneurs actually take that responsibility?

Lee: People ask all the time, "Have you done your estate planning?" And that's usually a yes or no answer. I don't believe it is a yes or no answer. I'd like to take the term "estate planning" and throw it out the window and replace it with family leadership. I think family leaders become somebody that is working on a regular and ongoing basis. I don't think you can do your estate planning. So many people ... I can probably guess, if I was talking to just anybody on the street, I could ask them, "Have you done your estate planning?" They say, "Yes" I said, "Well what have you done?" "Well I've got a trust set up" I said, "Will you pay me a hundred dollars if I can guess the name of it?" I'd probably win a hundred dollars nine out of ten times because I would just say, "It's the John and Mary Doe Family Irrevocable Trust and would you give me another hundred if I could tell you the provisions of it?" I would probably win another hundred dollars every nine out of ten times.

This boiler plate industry really has become something that is designed not to strengthen families, but to tear families apart. In fact I'm so bold to say that the estate planning that's being done around the world, not just United States is doing more to tear families apart than to bring them together. Its taken families from "we" ... I remember an attorney telling me one time, I took him to a basketball game and he said, "I just came from the greatest family.

Every time I went to a family retreat with them, they were talking about what we're going to do and we're the so and so's and we're going to do this and this and this. Said mom and dad have died both in the last year, I went to this last retreat and they were talking about what's mine. What's my share, what am I going to get? What am I going to do and the "we" went out the window. What I'm watching is a lot of the estate planning takes families from "we" to "me". That's really sad. That's just one thing.

What's happening lately... That's been around forever and especially since they've introduced the estate tax going back to 1914-13, in that area. Since we fumbled with that, the emphasis has been on how do you save taxes. The reality is that what we discovered over time is that is that if I could sum it up in one word, one word, what would keep families together and hold the family true wealth together, not just the money but the things they value more than money,

I would have to say the word is gratitude. Because gratitude is the opposite of entitlement. If you can implement a grateful attitude, an attitude of gratitude within a family, where it's centered in their heritage, their traditions and in their daily actions, then you've got a great step forward. That's been a common element as we've studied families over the years.

John: As entrepreneurs there's so much for us to be grateful for and I really love the concept of family leadership because I did as I was saying a lot of estate planners have the privilege of working with some extremely successful clients. Some of the most successful entrepreneurs and high tech sports and entertainment and I got to say Lee, even some of the most creative attorneys it was cookie cutter type things and they had nothing to do with the family and I'm even thinking its worse than you're saying because so many people think they've got the document done and the world's changed.

The tax laws again have changed so that if you have over five ... 2015, I think its five million four hundred thousand in the US and there's now portability, permanent portability between spouses so if you're married it's ten million eight, you don't have to pay taxes on it. As entrepreneurs many of us are going to go past that. It's like the old tale, going ahead and wagging the dog. The taxes are not the issue at all, its how do we build great families that are going to make a difference?

Lee: The tax savings is a commodity John. It's a commodity. We have enough smart attorneys around the planet that can figure out ways to move the wealth from one generation to the next without being overly burdened with taxes to do so. What's really important is how do you move the things that matter most.

Look at it this way, would you rather have Jack Nicolas' clubs and trophies, or would you rather have his swing and course of knowledge? So much of the estate planning is being done is how do we divide the clubs up and the trophies up and then expect them to go out and score well on the course just because we divided that up. I think most people would say I'd rather have the wisdom and the knowledge and the experience to be able to move forward.

There's so many gold nuggets within a family that nobody knows how to mine, nobody knows how to take out. That's issue number one. We've been working on that. We've got lots of examples of families where, for example extremely successful family that's in the business of steel fabrication, about 13 or 14 years called me ago and wanted to sell me a horse barn. We got talking and he said, "I'm thinking of selling my business", I said, "Why would you sell your business?" He said, "Well I've got five children and we're making enough money that I'm scared to death that it's going to ruin my kids." I said, "Well let's talk."

Fast forward to today and this company is doing more than ten times what it was doing at that time. His kids are involved, his in-laws are involved, he took a three year sabbatical where he

did not call home once to the business. The community work that they're doing, the difference that they're making in the community, the pride and the enthusiasm his family has throughout is a great testament of a mind-set shift where you move to the things that matter most. Imagine then that everything else just kind of falls into place. It's something that we've seen for a long time, but there's another threat right now to the family.

John: Save that for a second. I just want to have Lee, this is so valuable what you're saying and I want everyone to imagine not a week off but three years away from the business what used strategic coach termed, Dan Sullivan in three days...

Lee: Yeah.

John: Three years in three days and have the business better when you get back and have all the family involved that commonality of purpose, mission, values. I'm asking all my fellow entrepreneurs, how would you feel if you had a business like that. Lee, I think I'm a pretty good business, I couldn't do that. This is exciting things and if you could really work toward that, that would be huge.

Lee: We've got a number of circumstances like that. Who knew at that time about, prior to Alexander Haig, you remember Alexander Haig don't you?

John: I do remember that he's in charge, I think. At least for a moment.

Lee: He had a show called "World Business Review" and he sent a team out just to interview this client because he had heard about how successful they had been and they showed it on United Airlines for, I think 30,000 flights or something but because its so unusual that you'd be able to see this. Now we've got multiple examples of that and then that bleeds into their business. Its not something that's limited to the family, it bleeds and overlaps. Family's transition from being a family business to a business family. It's that tipping point, if they don't transition successfully into a business family then they will lose all the assets.

For that reason I've termed, coined the term for the work we do the business family coach because that's that tipping point. Are you prepared to really transition from being a family business into a business family?

Let's talk for a second about the second arrow in the quiver right now because this is a real challenge. When you look at what's happening in the world, I've had the opportunity, Dan Sullivan has talked about it for years. You mentioned Dan Sullivan as a strategic coach, Joe Polish is talking about it a lot. The "Abundance 360" that we've attended with Peter Diamandis, where we're seeing such exponential growth and global economics. Global economics. We're seeing it in technology and were seeing it in science and medicine.

All of these are disruptors. All of these are what we would call accelerators which create what I call perturbation. This is my symbol for perturbation. Because we don't even know what questions to ask. When you think about a trillion sensors in development right now, where the technology exists. If I walk over to the refrigerator and I got to open the door it's going to tell me what my body needs to feed myself based upon what my body is telling me it needs. That's kind of scary. But two years ago, two conferences ago when somebody stood up and said, "With all of the sensors that are out there, your children will not be able to lie to you." They got an applause. I starting thinking about this I said, "Wait a second. My children have a right to lie to me. I can't deny them of that right." If they walk through the door and I say, "Where have you been?" They say, "I've been at Billy's" and the door says Bonnie, then I know that they're lying. If they walk through the door and say, "Have you been drinking?" And the door say's yes and they say no because the sensor picks up when they walk through, then they don't have the right to lie. If our children don't have a right to lie, how do we as a family teach them to tell the truth?

We're going to have some challenges that have never existed before. We're going to have some opportunities that have never existed before. As things happen and you start thinking about ... you've heard John, if you take a piece of paper, just a plain piece of paper and you fold it in half once, you fold it twice...

John: Mm-hmm (affirmative)

Lee: It's about the size of your thumb nail. You fold it ten times its about the width of your hand. If you do it 16 times it starts getting up to our height. 26 times it's taller than the Matterhorn, 42 times it's from here to the moon, 50 times from here to the sun.

John: It's such a great illustration of exponential growth that what's going on out there.

Lee: You can't comprehend it. Look at Moore's Law since late 1950-59. They said every two years, technology's going to double and the cost is going to drop in half. How many doublings have we had just since then? We've had quite a few. What's going to happen over the next two years is we're going to have more knowledge. We're going to have more perturbation if you will and the need for more stability. Families are going to be attacked.

What's happening in industry right now at the center, take the medical business. At the center of our medicine, our medical business is the hospitals, the insurance companies more than anybody else and the pharmaceuticals then the hospitals. Then you've got different associations and then you've got individual doctors. Finally you get out here, the patients, we don't even know what to ask. I asked my doctor the other day, "What would it cost for this procedure?" He said, "Well which insurance do you have?"

John: Mm-hmm (affirmative)

Lee: I said, "No, no. What would it cost if..." He said, "Well, I need to know what insurance you have before I can tell you what it costs." What? It's the same thing in the financial services world because there's now with derivatives and technology and everything that's happening, it's scary. One question I would have is if I set up a trust, I do this wonderful planning and I use my local bank as a backup trustee or the trustee, who's to guaranty 40 years from now that Bank of Cuba or Bank of China doesn't come in and buy it to satisfy their shareholders and make the shareholders of the bank a lot of money. All of a sudden my kids are relying upon Bank of China to be their partner in the will and the trust that goes forward? How do we bring that independence back to the family and put them back into control?

We've created, empowered wealth has created two different concepts. One we call "Empowered Wealth Connect, which is all about training the basics of empowered wealth. Anybody can access that. It's a subscription course they can just get ... and it's going to continue to grow.

The second is what we call "You Link". We haven't announced that yet or maybe just announcing it. It's called "The Empowered Wealth Leadership Innovation Network". NK for network. You Link. We see that as being the nexus where families are able to set up their own entities, their own trust companies in the state of the domicile. Very inexpensive to do but something that needs ... Once they do that they develop their own autonomy.

Then being able to link with "Best Practices" through that. Now there's a number of nuances around that that we're excited to discuss. One of the things will be that once established we will not be able to change ownership without the ... instead of being like a typical bank, they can change ownership just when the shareholders say, this case the actual people that are the clients, if you want to call them that, the member clients. You won't be able to transfer ownership without their approval.

We're looking ahead into the future and saying to ourselves what do our clients want to have? How do they preserve that family unit? How do we strengthen that family unit in all areas, the financial? Will they have the right questions to ask? Also in their core, their family, their health. They're what we call principles. Values is a whole other conversation that we can have. Values and value based planning means nothing. Nothing! Because the word integrity to you is completely different than the word to me. Enron had it emblazoned upon our stone in their lobby.

How do you, within family identify principles which are based upon agreements, which are based upon experiences and stories that the family or the business has. We become experts

on mining principles out of family history so we bring families together. We're being able to hold them together in that way.

We're seeing that as a nexus so that nobody can sell this out from underneath them. They have control over where they're going. They're not going to compete. That there's going to be a role for financial advisors, it's going to be a great role for financial advisors because they can do so with integrity. Moving forward, they can provide expertise which is what they're going to need in those areas.

John: Yeah, Lee...

Lee: They will still have a need but they're not going to control and dominate.

John: What I found Lee too, I've been in court where banks have lost their way and we'll just go with that, with very wealthy families where we've sued to transfer the trustees. Normally after, you can get it done but it's expensive and it's only for the larger families to do that. There's so much turmoil always in the financial services industry that this is something that we're going to take more and more responsibility as an entrepreneurial family to make sure that we're taking these actions that we can control our own destiny and have them align with our principles.

What I'd love to do ... what are you seeing are some of the best practices of these successful families?

Lee: The term "legacy", let's just jump at the term "legacy" for a second. Legacy in most people's minds means something you leave behind. I would have to say that what our clients tell us is that legacy for them is what they live, not what they leave. They develop practices around going on vacations with a purpose. Where they actually capture the experiences and the learning. They capture experiences. They name them. They brand them. They put a handle on them so they can transfer from one person to the next.

They develop committees within their organization, what we would call "The Empowered Family Enterprise". Where they develop committees that are living breathing entities that are able to discuss, document and make decisions around things that relate to the family. Everything from education to outside business activities, inside business activities, family owned business activities, all of the other issues that are associated with it. We're seeing them very active not in waiting till they sit around the attorney's desk to see what they're going to be doing, but to really be involved now.

That's another thing, you know when I said earlier I could tell you what Mary and John had in terms of a trust. I could also tell you what it was named. It be the Mary and John revoc... Here's

a document that's intended to transfer the wisdom of this family to the next generation. You let the attorney name it. You wouldn't let the OB/GYN name your kids, but here's this document that's so precious and yet we treat it as just a deed to realty or a deed to some asset or deed to property.

John: Yeah Lee, I've seen this over and over again where things, a document like that blows up families. I have one of my financial advisor coaching clients was one of the heirs to one of the big American fortunes. He loved being a financial advisor but he was also involved in the business. He was the only one of the kids, out of three families that the father had remarried three times, that was involved in the business and when the father passed away unexpectedly. This is one of the being the name that everyone would know instantly, they went to the attorney's office and this was a family that was very close. When they went to the attorney's office and they read who was going to be the executor and it was the youngest child. It was my financial advisor coaching client. The family never was the same.

As a matter of fact for the most part they haven't talked to each other and the business was sold, global player to outside the US, very dysfunctional for not only the family, the community. You and I have seen this over and over again the lack of transparency. You're talking about the best practices of so many of the practices, we do for leadership in our business. Doing it for our families as well.

Building that consensus. Getting them involved. Creating that energy around those principles. We're all out there making a difference in our families.

Lee: We have one client now John, just to give you a quick example. Two guys came together. One guy bought the other person's business. They had a handshake agreement that once it reached a certain level which was in the hundreds of millions, that this other person that got bought out could crawl back in for a third of the company. This guy died four years into the program and now this guy's a partner with the widow. Widow doesn't know anything. She sues to get ... She's going to sell the business so he's trying to protect his interest in it so it becomes this big fight. Things start falling apart.

Fortunately, they started putting things back together and then empowered wealth came into it and I have in the last month in my email from the widow, an email that says, "Thank you so much." I have never understood how gratitude could make such a big difference in my life and in the life of this company. We've watched what I would call an ocean liner do a 360 completely around. It's been five years since he died. We've seen working with them just in the last year, we've seen this ocean liner turn around and she says every night when I go to bed, when I kneel down and say my prayers I'm going to thank God that you showed up in our lives.

I'm just the messenger. We've worked with enough families and continue to learn from amazing entrepreneurial, what I call "gratitude entrepreneurs".

John: You're not the messenger, you're the facilitator. You're helping to bring that about and because you and I could also continue and just tell horror stories for the full day without any problem of so many families making mistakes on this, particularly entrepreneurial as we get more complexity. This is where it's so important to take action. Let's talk about some action I want to go to the next segment.

Let's go Lee to ... I'm going to pull up your book. I'm not going to let you go with anybody else's book because you have been out there sharing a lot of wisdom. Tell them how they can get your ongoing wisdom here in a second. I've got the "Brower Quadrant". Tell me what this is.

Lee: The Brower Quadrant's a book I put together the wisdom of what we've accumulated up to about four or five years ago. I was afraid to let it out because we continue to grow, but each week it seems like we sell more books than we have the previous week. We're getting calls from people saying can I get 25 copies, can I get 50 copies, I want to give it to my family, my friends. What it does is walk through some of the elements that we just talked about in terms of true wealth. I think at the time that I wrote it I was still in the financial services business so it has some elements of that in there.

The principles are true principles and they're unique. I continue to get great people saying thank you very much for that, it's changed the way I think and it's changed the way I work with my clients, depending on whatever industry that they're in.

John: Now I can recommend it strongly and I want to go to the resources now here. In this section we talk about resources Lee. What I want to do is pull up, let me start with your web site on empoweredwealth.com. Again for everybody that's watching, not watching this but listening to it, you can go to AESNATION.COM get all the links of everything Lee and I talk about as well as the transcription. We don't want you to miss any of this valuable information. What are they going to find at the empoweredwealth.com.

Lee: Empoweredwealth.com is pretty much headed up by our CEO, Ron Nakamoto. He sits through the content. He travels around with me and sees what I'm doing and he puts a lot of content there. It also will open the door to some of the things I do as broadcast every Monday morning. It's free. It's called "Meaningful Mondays". It's based on how to make your year more meaningful. I think we've gotten a lot of people that really enjoy ... It's about a five to six or seven minute extemporaneous broadcast from wherever I'm at in the country. We started about a year and half ago to make things more meaningful. We've got invitations. We do a thing called ACT 215, 2015 which is ambassador collaboration and training. This is not a

subscription or monthly fee to become part of our thing. This is an opportunity to come in and learn the basics about what we do so that you can share the basics. It doesn't give you the depth that some of you may desire. That's something else that you can talk about. It allows you to share the depths, the basics of it. We have people from all professions that come in and go through and get certified. Then they have to come back each year and get certified to make sure they're still telling the correct story. We're very, very careful about making sure that people tell the correct story. This is not a money maker for us. This is more of a way to spread ambassadors out there that can carry the true message of what we're doing.

John: This is great. Let me go in the last segment here. That's a big key takeaways. I've got actually a pretty full page of notes. I just want to go ... as tradition I usually do three. The first one, for all of us as a fellow entrepreneur I want to address you one on one and say that number again, 97%. You're out there making a huge difference in the world. You're creating tremendous value. You're realizing that value and over time you're going to continue to build wealth. Lee pointed out a number that we should all have etched in our mind, 97%. 97% of the family businesses do not last through the third generation. I can tell you I've met a number of them that are dysfunctional at the second and a few at the first. That's our own fault.

We've got to take responsibility. Second is I love the term "Family Leadership". We spend so much time building leadership, powerful senior team, it's driving our business ideally so we're a less important in the organization. Maybe even take that three years off, maybe at least a few weeks. Take that responsibility with your family too. Think of the difference, you're not there. They're reading the will in the attorney's office, the trust documents and so on. Is it going to bring the family closer together and do everything that you want and have that continue? You have that opportunity now to really build that.

The third part is that legacy. I think the legacy part is such an important one. Many of our businesses are our babies. We're really wanting to make a difference. We want it to continue beyond ourselves. But we need others, our family to be supportive of that. Let's make sure they are.

Lee I want to thank you for taking the time and sharing your great insights have been invaluable. The way they become extremely valuable to you, quite simple, you have to go out execute. Get Lee's book. Go ahead. Go to the AESNATION.COM. Make sure you download the show notes. The transcription. Follow up on these and bring your family together. Make sure you experience the gratitude. Share it with them. This is something we should do each and every day because everyone who's a successful entrepreneur is truly blessed.

Your clients, your future clients are counting on you. We wish you the best of success.

A Second Opinion on Your Finances

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Founder and CEO
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