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EPIISODE
105

Feliks Golenko

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John Bowen and Feliks Golenko

Episode #105

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Best of success,



John Bowen
Co-founder, AES Nation

John Bowen: As successful entrepreneurs, we are piling up data and as we're gathering all these data on trying to serve our clients well, we struggle with what do we do with this? We all know that it's time a big data that technology is there to allow us to capture pretty much information on everything no matter what size business we are now but one of the keys is how we can we use this business data intelligently? Really to do one of two things, to improve our top-line revenue or to cut costs.

Well, I have one of the world's experts. It's actually coming from Germany to join us today to share with us how you can do it. This is going to be something that's invaluable to you. You do not want to miss this. Stay tuned.

Feliks Golenko. I so appreciate you joining me today. We had a good fortune meeting at 25K Joe Polish Mastermind Group, the Genius Network. We're sitting right next to each other and you're telling me all the things you were doing. I'm in the process of doing so many things that you excel at and rather than just me asking you questions. I thought I'd share you with our 10,000 plus successful entrepreneurs. First of all, thank you for joining us.

Feliks Golenko: Well, thanks for having me John.

John: Well, let's dive in. You are a business intelligence expert and you are really focused on dashboards and so many of us have heard so much about dashboards and so on. Maybe what I'd like to do Feliks if you would is tell me ... Define what a dashboard is so we get a framing of it and then I want to go ... How did you fall in love because I know you're passion about dashboards. We're going to talk about it a little throughout this whole podcast. How did you wake up as a young man and say, "I'm ready for dashboards. That's what I'm going to do. I'm going to dedicate my life to this."

Feliks: Well, okay it's ... First of all, let's define the dashboards first or let me share with you John my definition of dash, what a Dashboard is. I mean dashboard is not a homepage of a portal that we see where it shown what the content this portal is offering. Well, I see dashboard as a business tool. Actually, one of the most important business tools and here is my definition of a dashboard. I say a dashboard is a visual representation of metrics in a way that supports making decisions and triggers taking actions but also in a way that allows for monitoring the impact of decisions that were made and actions that were taken.

Okay. Now, I was talking about the metrics but it's not only about visualizing the metrics. It's about taking decisions and making actions and then monitoring the impact of those. This is what the dashboarding is all about.

John: It's so powerful. I've got a great team. We've been doing it a lot Feliks. It's just really in the last five years particular. I did it when I had my investment firm. We're managing billions

of dollars and you had to do it, I have more of a small midsize business now or businesses and, but we started with all the big data collection things. Everything that happens we measure. It just got overwhelming where we got all these great data but how to use it and then started introducing the dashboards.

What I found is my team conversations went up. The quality of conversations went up drastically because what we're doing is we're not net picking on different things. We can actually see the impact the decisions are having. First, we can have good information to make decisions but I think the second part that you were talking about is the power to see what happened because you made those decisions that change.

Feliks: Exactly. Now, you mentioned one very important thing. At the beginning you said why we should use dashboards. Well, to improve our bottom line but an indirect impact of using dashboards properly John is you really simplified the communication. I have been sitting in so many status meetings and board meetings and so on that it goes for hours and hours and people are talking about what they have done and what they will do. I'm saying, "Well how about agreeing on what was achieved and what was measured with the metrics that we then show in dashboards." All of a sudden, the meetings go 15, 20 minutes and that's it. You talk about the facts whether you like them or not.

John: Yeah, I know. Sometimes I go, "Oh, this is fantastic and oh, this is bad." You have the right information so you can make an action out of it. Feliks, let's do a little background now. How did you get to where you are today? I want to give some framing because we're going to dive in and we're going to dive in and we're going to give them step by step how you can actually deploy this in your business and if you are already deployed how you can really raise a bar to make it even more valuable but give us a little background.

Feliks: Well see, I studied Systems Science and Mathematics that brought me already in a position to deal with numbers and so on. By nature, I tend to be very, very structured. This just naturally evolved for me and then 25 years ago, I formed my company that concentrated on that focuses on the reporting. Create designing and implementing dashboards and reporting systems for our customers and that's what I do and what I love our dashboards. Well, I still personally go and design dashboards and we'll talk about later the importance of properly designing dashboards. I hope I'll be designing them for years to come because I really like that part.

John: One of the things that as an entrepreneur I really appreciate people that are passionate about something that I'm not good at. One thing as entrepreneurs, you get so tempting, we have to all be good at it everything. Now, you want to ... You can and you want to build on your strengths, know your weaknesses. You don't want to end your career with strong

weaknesses. I want to work with Feliks, individuals like yourself who can really do something that's going to very much accelerate the success of our firm.

We know we need dashboards. If we're going to have data, we're going to have our ... We invested in. Many have started putting in marketing automation systems. We're now tracking all the way through the client experience. I mean the amount of data that is being generated is huge. There was a fair amount of expense deploying all this stuff and we got some most people at that point then started getting rudimentary dashboards. How do you start thinking about ... Okay, I know I need to be able to make better decisions. I certainly want to make decisions top-line, bottom line. How do I go about getting even started on this because this seems like such a big project.

Feliks: Well, it is a big project. Actually, the business intelligence the way I tell our customers is not actually a project. It's a process. Okay, because every once in a while something keeps changing in your business, you have products, you have customers. You sell part of your company, you buy at other companies so I tend to see business intelligence as where dashboarding and reporting is a process. Okay. Now, the question ... To answer your question, how do you start? Maybe I'll tell you first two ways how not to start.

John: I may have already tried those but let's share them with everyone else here.

Feliks: Well, you said at the beginning and you just mentioned well we've got so much data and we gather so much data and so on. One way not start is say, "This is the data we've got so let's create dashboards on that data." Okay. Well, that's a bottom up approach. No, you need to start, stop down. You need to say, "What kind of information do I need to in order to monitor and analyze my business?" Well, it may happen that you still got a lot of data but some data that you really need for making decisions, taking actions is still missing.

One way not start is bottom up. The second way not start is ... Well, we've heard about this business intelligence. There are a lot of tools. Right? Especially BI vendors and they hate me when I say this. Okay. Let's say, "All you need is a good tool and that's going to solve your problems." Well no. You buy a tool first that starts with a problems and then you go bottom up were you say, "This is all the data and this is we're we could analyze. This is what we could do." Then you come to the state that I call Paralysis by Analysis.

You just do nothing but analyze the data the way to start John. Okay. I'm going to tell you the way to start is well, you define your business and we are talking to entrepreneurs here right. I tend to tell them, "Listen. Why don't you define your business as a value grown chain?" What is value grown chain? We could talk about this already for quite a while. Just very simple. You need to get your customers so sales is one part of your value grown chain. You need to

deliver your products and services or operations or service delivery is the second part of value grown chain. It's accounting.

You need to build for what you've done. Okay. Well, it can't get a much more detail but that's the first thing I say, well define your value grown chain and then for each part for each process a value grown chain well, ask yourself who are the stakeholder? Who are the roles, business roles that are involved there? What does that have to do with dashboards? Well a lot because after you have define the stakeholders and you would think just the sales part John of your value grown chain. Right? I mean who are the stakeholders, your sales director and you as an entrepreneur you'd like to know what is happening there and then you go and that's the most important thing.

Well, what kind of ask questions are those people asking themselves on daily, weekly, monthly basis and this is when you start designing dashboards. This is when you try to answer with the dashboards that you are to design. The questions those stakeholders of your value grown chain have gone and then obviously, when you design the dashboards or we may talk about how to design dashboards later on John is ... Well, then this whole data part comes in to the place because I mean we said before dashboards are visual representation of metrics.

Well, what we made for the metrics we need the data right? And then for this visual representation, we also need the tools but that comes only third, fourth step. First, you need to define your target audience. Who's going to be working with these dashboards and then you need to define the questions they are asking themselves on daily, weekly, monthly basis or on ad hoc basis so that John, they can make decisions and take actions.

John: Now, Feliks that's what I was going ... This is really good and the challenge when I've worked on projects like this, what I've found is whoever is running is really tempted to just build it in their own vision and what you said out is to me the most important part is, this is really a phenomenal ongoing tool, a process as you call it. What it does is it's going to empower the stakeholders in each of those functions on sales, whoever is leading your sales. They're going to have different questions than other members of your senior teams and certainly other ... If you turn it over to technology group and say just put it together.

Once of things is this is a big involvement but what I love is that instead of I find this with my, I'll use us, our sales team now and the decision when we have something really working when we input more resource on it and leverage it up. On the other hand what we can see very quickly when things aren't working and instead of 90 days, we see it often times in two weeks and that's a huge difference in making midterm adjustments and the other part is there's no debate on these things anymore. I mean where marketing sales used to go at it. It is what it is guys, what are we going to do type thing.

Feliks: Exactly. I mean this is how many leads you've got, this is so many prospects you've got, and this is what your conversation rate is. What is it there to discuss? If it's not there where it should be? Well, think about the actions you are going to take and what you said instead of six weeks or 12 weeks, there are two weeks, you see the impact of those actions. This is exactly why you should use that.

John: Well, let's take it. We now have gone ahead and we put the definitions is of what we're looking for, we've understand the questions. We got very clear on the value growth chain. We identified the stakeholders. How do we go about establishing an architect because I've got into this sport ... Feliks is one of the first projects we did on this and it's like, "There's so many different directions we can go and they're different." Particularly not in these companies that I have now because we're all using the same tools data but I had data over a different places, this and that. How am I going to bring them together? How we go about creating the architect?

Feliks: Well, John there's one very important step that comes before the architecture. Okay. Well, and it's about designing the dashboards. Remember I told you the dashboards are visual representation of metrics. Now, what I see. There are two things here that are important. First, you need to understand or you need to drive the right metrics. Okay. Second, then you need to think about how are you going to visualize? How are you going to show these metrics so that they provide you actionable insights?

It's all about taking actions or making decisions and taking actions. That's a very important step and this in my opinion and in my experience also is something where entrepreneurs pull back and say, "No. We don't really know. It's so difficult. How do we know what kind of metrics we need?" Well, that they work out but then how do we know how to visualize this? They say, "Big corporations they've got business intelligence team and business analysts and then so on who then help them visualize that. We don't have that." Well, it's not that difficult.

There are a few very simple principles on how the data could be visualized. As a matter of fact, we talked about before about my podcast and so on when I share exactly these things. I claim John there are two types of charts. Two types of charts. That's enough that you need for visualizing the data. Line charts and bar charts. That's it. Okay. This is something that comes before architecture. Now, answering your question. Architecture obviously is a very important layer that you need because this is what bridges the data in your ERP's, CRM systems or other company data basis with a front hand that you built there.

For this, you ... That's an IT issue, that's really heavy duty IT issue and what I really suggest to entrepreneurs, if their IT departments are not big enough, strong enough and very seldom they also have got this of knowledge of building the proper BI architecture. Go, there are enough BI companies around the world. Go and hire an architect who will then design your BI architecture. It's like designing a house. If you would like to have a special house, well you

don't just go and build it. You hire an architect. You tell an architect this is how what I would like to have and so on. Architects go, send designs. It's not a major issue here but very important one and then somebody can build this. A lot of people can build this. My advice here, well before you really start implementing this, go and find an architect who is going to put up the proper BI architecture for you.

John: Now, this is ... One thing that's so great about today's technology and our ability to connect with so many different people around the world. You and I are talking Silicon Valley to ... You're in Munich aren't you?

Feliks: Yes, I'm in Munich. Yes.

John: In Munich. On a free call on Skype. I'll give Skype credit here.

Feliks: It's amazing. Isn't it?

John: Yeah, it was very high quality the whole thing. To find different resources around the world who are right in this business intelligent architect is so important to do it in the beginning. Let's go to the next part that was selecting the right tools. What do you mean by that Feliks? How does that come together?

Feliks: Well, we talked about the visualization. Right? How are you going to visualize your data? I think all ... Well, a lot of people ... 95% of people dealing with metrics also have come across excel and I still believe excel is one of the greatest tools, business intelligence tools we have got but it needs to be use properly. Okay. It's not good for everything. One of the biggest problems I see, people tried to use excel for everything, restoring the data, for entering the data, for managing the data and for visualizing it.

No. Excel is good for analyzing the data and then there's a whole pallet of tools that you need. By the way, you need the tools for storing the data properly so that they can be reporting on. You need the tools for gathering the data from all of your systems, your PCRM and so on. Usually, end users don't care about this but IT does. Okay. Then on top, you need the front hand tools. You need the tools for creating the dashboards or creating reports and if you want to do some analytics you want to do some ad hoc analysis.

Will you need tools for that too? Okay. This whole range of tools and I won't mention them right now. I wouldn't like to favor any of the vendors but today you've got a whole range of tools that help you do that and they rate for few hundred dollars up to 1,000 grand a half per user. It depends how you would like to do that but what I really recommend, first thing you should do as an entrepreneur, if you are Microsoft minded and so on. If you like excel, that's the first tool you should look at that but then you should use it.

John: One of the things that's been so great again about technology is when you talk about all these tools, the prices have gone down dramatically and there's so many winning databases. There's only a few big players, almost everything connects in if your using a major database. For relatively, in expense of prices at least that's what I'm finding Feliks. Let's go one more step then. We've gone clear. We've defined it. We got everybody involved that should be involved.

We brought in a business intelligence architect to start framing this out. We think we're ready to go. They have identified some tools for us to use to get, the full effect. Now, we got to go deploy and implement it. How do we make that work? Because this is ... One of the scary parts as an entrepreneur is when we're doing all this stuff, this is not during the time of development and implementation. Not only is it not generating revenue or saving costs, it's distracting and it's destructing my best people and because they have to say what questions and so on they have. They've got to get some feedback and then I'm writing checks along the way. How can I make that deployment and implementation as effective as possible because I think every entrepreneur can see, boy if I get this information, the quality decisions I can make more quickly that are going to help serve our clients, our customers better and really make a better environment for our whole team. I find that my teammates love these but I got to say Feliks, they weren't always happy as we're putting some of it together too.

Feliks: Yes. Well, first of all John, a lot of companies, a lot of entrepreneurs I've see what they believe they design the dashboard. They have them implement, it they're done. They just only start. There are two very important things you need to do there. First of all, you need to teach. You need to train the users who are going to use these dashboards. You need to train them how to use them because remember, you won't be implementing new dashboards if you were happy with the existing ones.

Well, even if you don't have any dashboards right now. Well, if I just pull up a report or a dashboards on a screen, I should at least get five or ten minutes training with somebody explains me how to call it up, how to use it and what to do with it. The second which is much more sold and much more important. Well, with introducing every single dashboards, with introducing a new dashboard in your organization you're changing your organization. You're changing the way your organization works John.

As you said well, not everybody is really happy about new dashboards being introduced. Why? Because if you have chosen your metrics properly, if you have visualize those metrics in an expressive way then it shows. They shows the result of their work and not everybody performs as well as they would like it. One of the major mistakes I've seen some companies doing when we implement a dashboards, we started operating with those for a couple of weeks and they fired people. It can't be that you're performing 50% worse than the others do.

That's the worst thing you can do. This is why people also are scared. All of a sudden, I'm being transparent on the most important things that are in my area that I'm responsible for if I'm in sales, for sales for conversations and so on and if those results are not where they should be. Well, you need to be very careful about this. What I'm saying, well putting a dashboard, implementing a dashboard in your organization, it's a change process and you need to manage this very carefully and avoid things like then. Well, if the results were not there, where you'd like to have them? Fire people.

Sometimes you may want to do that. But then take actions. Make that ... Improve that. After six months, the situation doesn't improve well then you may think about some other consequences. But still think about when you implement dashboard, it's a change process in your organization and not everybody will scream you for that.

John: I can tell you they will scream but not necessary they hear and I want to just encourage everyone because I have gone through this over the last couple years. It's a never ending process because business has changed information. You'll learn and you go I'd rather measured this and that and you can get develop too many measurements and you want to narrow it down to the ones that are most important for each of the stakeholders. I got to tell you Feliks that the amazing part for me is now we've got into the point where, remember if I had conversation yesterday with one of my senior team members in the department that she runs.

We only have a few metrics and they were the ones quite honestly finding it the most that they didn't want to be measured because it was a human interaction type process more than widget going out the door or sales conversation. There was a lot more qualitative subjective type things but now they are frustrated that they're not getting the analytics that everybody else is getting. How can they do that? We're spending a lot of time and just getting the top process on it and then doing it.

That's been such a nice evolution where before I'll just do it in one area and now it's like let's do it over the whole business and make sure we're getting great information. We've now what we've got the project going. Tell me where ... as we go through this what's a reasonable time line for different types of businesses going through this?

Feliks: Well, that's hard to say but given the methodology that is available to us John today and given the tools that are available to us. If we split this process into three phases as we discuss. First is the design then is the development implementation and then it's putting this in operations. If you takes part of your business, one part of the value grown chain like sales, within couple of weeks you should be able to design dashboards if you work on this in a concentrated way.

Then it comes out that for the sales part, you need say five to ten different dashboards and detailed reports. By the way, you cannot assume that you'll have one dashboard. A lot of people just tried to say, "Well, we need one dashboard. We're throwing everything." No. No. That's doesn't work. Anyways, if you would have five to ten dashboards and then if you choose proper tools then we are talking another four to six weeks if you've got good developers and an architect that at the beginning where you can develop those.

We are talking about two months of period as an example where you can get to the point where you've got virtually nothing and at the beginning and at the end of this process, you start managing with dashboards.

John: I will just encourage everyone that the end result with a top of process working the right people, you can get through this pretty quickly. All those are short period times when we start thinking about we're in business. Most of us are in business for the next 25 years. I'm 59. I'm still a strategic coach just shot me an email because I had to missed a meeting with little out with a cold and he goes, "John, don't worry about it. We got 25 years to get it right. We'll keep on improving."

I think that's on all business we should be thinking this long term and certainly on dashboards and measuring so that we can make even better decisions and they're came all to the facts, it's going to be great. Let me change gears here now. Let's go to another segment.

Feliks: Okay.

John: Feliks, is there a book that you'd like to tackle to your fellow entrepreneurs? Either in the space or outside of the space that would be a great book to share with them.

Feliks: Can I recommend too?

John: You can recommend. You're not the farthest away that I ever interviewed but you're getting close.

Feliks: This one and it's not a business book. It's from Ayn Rand and its called The Fountainhead. It's more philosophical book but the main character is an entrepreneur. He's an architect. I really, really recommend everybody reading this book. It's going to take you a while but it's also going to make you think a lot. Now, ten thousand of business book so it's ... I supposed to talk about one business book. I'm recommending two books and the business book I would recommend I read a couple of weeks ago and it's from Gary Veynarchuk Jab, Jab, Right Hook.

I thought that was great. I'd listen to quite a few podcast of Gary and he doesn't always have the style I appreciate and like but his message is very clear. He's book is excellent. For everybody who would like to get their message out, I think that's required reading.

John: I have found Gary to be one of the most interesting guys out there. That's a great book and that one I've read and for he is by far one of the most successful social media. I think he builds business up to about 300 million of revenue in providing consoling and so in the space. There's a lot of social media experts but Gary's actually done it, not only for he's most famous for his wine videos. I enjoyed good wine and I remember watching him in the first three ties, "What is this crazy guy doing?" But he built in to a huge business so well done.

Let's go to the next segment which is the Smart App. Let's talk about the application in a day. On your smartphone, I know you trouble a little a bit because I run into you in Phoenix. On your smartphone, what's an application you'd like to share with the entrepreneurs out there or fellow entrepreneurs?

Feliks: It's called Things. I told you before I tend to be very organize then this just helps me really keep track of all the stuff I need to do when I need to do it. For me, I'm a big Apple fan. I've got all Apple devices and it's just there's app for iPhone and for iPad and for ... I'm using on my Mac Book and everything. Everything is synchronized. Everything is in cloud. I love it. As a matter of fact, I go and shop. I actually at home and when I'm at home and I need something, I note a job done and put it in things and go to the super mart. That's a really good one.

John: I do have an Apple iPhone but all the rest of a financial guys who were all PC based here but for those of you, you'll take a look at it. Let me ... We've talked about an off a lot, I want to go to your resources because you got ... Resources that are available Feliks. Let's go. I'm going to pull up your website. Tell us a little bit about what's at your website then I want to go to your passions site next.

Feliks: Okay, well that the website is www.multibase.de. This just represents my company. What we do is we design and implement dashboard and reporting systems. This website tells you how we do it and also tells you for whom we've done this. We've been doing this for 24 years now and my passion site is I love dashboards. I just started this podcast. Well, I'd like to mention this. You're one of the people who motivated me to do this because I think this is just something what ... It's a great way of sharing what we are passionate about. I'm passionate about dashboards.

I'll be sharing this podcast everything around dashboarding why we should use them, how we should use them of the tools and then once the community grows I will also implied people to send me their dashboards and reports if they believe they could be improve and I'll be critique

in them. I can be quite direct but I'll also tell them, "Well, this is I would change and so on." This is how my podcast is going to evolve.

John: Now, that's great. I tell you you're going to enjoy it a lot Feliks. Anybody that's ... You'll listen to this episode, if you're interested on dashboards and have watched first step podcast, it's very powerful. It's going to be some great insights. Remember you can get everything that were talking about it aesnation.com all the links to any subjects that we talked about, the show notes, transcript and so on. Let me go to the last segment here. I tell you when I look at, I got a ton of notes because this is a project power off say process or process depending where you are in the world listening to this but that is near in the ear to my heart.

I'm going to encourage you in the website, Feliks has said these five I'm going to use his but number one define a requirement of the project. He went over great. The other questions, what are the insights? What are the questions you are asking already to get that information? Get really clear on the client experience a whole value creation chain. Who are the stakeholders involved them? I can tell you that's critical and then get the metrics that they're going to won. The second is establish the architect. I think almost always you're going to have to go outside your firm unless you're really large firm.

Feliks said get a BI business intelligence architect to work with you on this. This is not overly expensive but it's a great investment, it's not a costs. Three, select the right tools. There are so many tools out there now. This is where having somebody that can help you pull out the right tool for your database and then the deployment and implementation. Be tough on this, give enough time, recognizes can be a little bit of a destruction and certainly a costs but it's the vision down the road that you're going to have these tools.

I can tell you we went in a more blind probably than I should have and by the time we got out it, it was like, "Wow" Number five, I can say almost every does and do this well is teach the users. They've been involved in the process. When I first see it, it's like, "Okay, now we got all these. What do we do with that?"

Feliks: Exactly.

John: That's where we have to really help them get through. Feliks again, I want to thank you for taking your time today and really sharing your passion and something and so important for every entrepreneur, I'm going to challenge every entrepreneur out there to go deploy dashboards if you don't have them yet and if you do have them make sure you're constantly improving so that you can accelerate your success, serve your clients well. Your clients, your customers, all your partners are counting on you. Don't let them down. We wish you the best of success.

A Second Opinion on Your Finances

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John Bowen
Founder and CEO
Financial Advisor Select