

"I help my clients make informed decisions to enjoy a premium lifestyle and longevity."

- George Wislar

"I'm passionate. I am fortunate. I love what I do." I have been in this business for almost forty years. I take great pride in "helping clients who have worked so hard for their wealth actually to enjoy it and enjoy it as long as possible."

My clients know how much I care about them. Every Christmas, I get at least 15 texts from my clients wishing me Merry Christmas. We are like one big family. I enjoy helping them and making a difference in their lives. I am constantly thinking about and trying to come up with ways that I can help my clients.

My ideal clients trust me and listen to my advice, not just with investments but with decisions around aging and other areas, so they live longer and enjoy their lives more.



If you know me, you hear me talk about how most people are only good at 1-3 things. Fortunately, **my three things are perfectly suited for being a financial advisor:**

1. **Investment Management.** I love following the markets and tracking data to help improve my clients' portfolios. I often send out information to help other advisors at our firm learn and be informed about what is important, which is advantageous with the overwhelming amount of data and noise.

2. **Coaching and helping clients.** I leverage my knowledge and experience and ask deeper personal life questions to get to know my clients and help them make better decisions.

3. **Telling Stories.** I use real-life examples and stories from my long history of working with others to help people connect with and understand the information presented. I share what is useful and not, where things have gone well and where they have not because clients were unwilling to listen to and trust me.

I have seen hundreds of life situations – both personally and with my clients - over this lengthy time in the business. I know my strengths and areas of expertise. **In areas outside my expertise, I surround myself and connect my clients with excellent specialists I know and trust,** especially in income tax, estate planning, and insurance. These other professionals and I work together as a team for the ease and benefit of my clients.

I have recently discovered some data that really resonates with me and with whom I want to work. The data shows that the higher the intelligence and the higher the household income, the longer people live. This is a real issue to plan for and have expertise in. **I assist my clients not just in living longer but truly living well with the years they have.**

Did you know people can increase their IQ by up to 15 points? **I want to work with intelligent people and people who make an effort to increase their intelligence.** These are the people who need my help and expertise. I realize I cannot help everyone, so I want to work with people who most need and want my perspective and knowledge.

