ERIC's WHY STORY

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"Am I going to be okay?" This is the number one question my clients want answered.

And I get it.

See, I grew up poor.

Like, it was a *good* Christmas *if* I got socks and underwear.

My mom had mental health challenges and couldn't hold down a job. So she, my little brother Greg & I lived off food stamps, in a run-down house with shabby furniture. I was deeply ashamed and often wondered, "Am I going to be okay?"

One night I'll never forget, I was about 12 years old, and my little brother came to me saying, "Eric, I'm hungry. What's for dinner?"

Mom was gone so I checked the cupboards and the fridge; we had NO food.

I couldn't go back to him with nothing. I had to help & protect him. So, I went outside and found a big rock, cleaned it off, put some water in a pot, and boiled it.

I said, "We're having rock soup. Rocks have minerals so it'll be good for us."

Together, we drank that warm water for dinner.

I know. It's heart breaking. This was one of the saddest moments of my childhood.

Driven by that memory, at 16 I decided, "I'm going do whatever it takes to go to college, this is not going be my life too."

So that's what I did. I put myself through school and in 1986 became a financial advisor.

Today, many of my clients are upper-level management employees with fortune 500 companies. They're either retired or looking to retire within the next 3 years. They're good, decent, salt-of-the-earth people who I believe want to work with an advisor they *know* has their best interests at heart.

Many first come to me with questions like; "Do I have enough? What am I missing?" and "What should I be investing in?" But *I* know, underneath it all, what they're really asking, is that same question I asked growing up; "Am I going to be ok?"

I tell them, "I *know* how scary the unknown is. That's why my goal is to help make sure you never run out of money no matter what happens…."

And I believe my purpose in life is to take the load of worrying about money *off* my clients' shoulders and put it onto mine. I help manage their money, with the goal that they can enjoy their current lifestyle, focus on what's most important to them AND have the peace that comes with knowing they will have enough money to last *their* lifetime- - and possibly beyond.

I've come to realize that "rock soup" led me here. Just like I help & protected my little brother, now I do all I can to help & protect my clients. Seeing their faces light up when they realize that they are *better* than okay, is why I do what I do.

And when we work together, I promise to do the same for you.