

MOVERS & SHAKERS

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So, you're in the retirement business. When do you plan on retiring?

I'm going to start working part-time when I'm 75. Seriously. I have no plans to slow down, but only to shift how I work over the years. We've set up the practice to work as a team. I'm not the only advisor. We have Heidi Thompson as well, and we've got a team of eight with various experiences. It's really fun!

How has the industry changed since you started?

It's been so dramatic, it's hard for me to describe. The only way to simplify it is to say that, "You are responsible for your own retirement." It wasn't always this way. People must figure out so many details now in order to have an income in retirement. It's sobering, but I see it as an opportunity.

Why do you say, "The Tax Man Cometh?" Because, given the current political climate, and knowing that the current tax law sunsets in 2025, I believe that taxes are going up. Planning has become much more valuable to people.

What do you think of Traverse City all these years later?

Traverse City is magical. I'm almost afraid to say it because we are already on the map. But the energy here for entrepreneurs, deep thinkers and inventors is showing up in everything from the places we eat to the employment in the tech industries. It's so exciting!

What is the best advice your own clients have given you? Great question. My favorite advice has been to cover all my weaknesses by hiring people who excel at them, and to focus on my own strengths. I've tried to do that. I have also been encouraged to keep investing in my own education and real estate.

If you could give me any piece of advice for lifetime success, what would it be? It's different for each person. Start by asking your closest friends whom you trust the most to weigh in, "What are the skills I'm not pursuing and should?" Most of us are afraid to ask this of our friends, but it's when the real work begins - when we can get honest with them and ourselves.

Last words? I'm just getting started! This career is way too much fun...

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