As Seen In

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WEALTH BUILDING WITH PURPOSE

Focusing on *Your* Big Picture

Upholding a mission of serving clients over the long haul by helping them define and pursue what is most important.

Financial markets are continually influenced by world events, making change the only constant. That's why it's critical to have a financial advisor you trust because, according to Sonja White, President and CEO of Fortune Wealth Management LLC, trust builds confidence.

"Markets are often shaken by geopolitical events or terrorist activity around the world, which may not have lasting effects or be specific to only certain areas. Sometimes these perceived threats are very short term in nature, such as the United Kingdom vote to leave the European Union in the summer of 2016," says White. "In reality, Great Britain leaving the EU isn't life changing for everyone. Often, these events that seem scary at first create opportunities in the markets around the world."

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To help clients understand how these events do or don't make an impact, White and her team send regular email updates. She believes it's far too easy for "compartmentalized thinking" to take over, pushing life goals out of the picture.

"We proactively communicate to help our clients maintain their focus on long-term planning and investing," she says.

Planning with a Personal Touch

Instead of using a standardized template for developing a portfolio to support clients' goals, Fortune Wealth Management develops customized strategies using an in-depth discovery and active-listening process. With a clear picture of a client's unique point of view, an investment and wealth plan has a clear direction for the future.

"Well-defined recommendations that outline clients' options facilitate easy decision making," says White. "The benefit is that clients feel a high level of confidence because they have a concise and easy-to-follow plan that meets their needs."

This holistic approach draws upon the unique financial planning experiences, specialties, and perspectives of the entire team, which has access to world-class resources and collaborates with other professionals for full financial integration.

Taking a Rational Approach

"A rational and diversified approach to investing requires a risk-managed approach," says White. "There will always be some risk, but recognizing that means we can help clients understand, not worry about it."

When a long-time client passed away, her husband gave White her greatest compliment: "He said, 'I always feel better after I talk to you. You always have such great ideas.' And he thanked me for being there throughout their lives. It's an honor and a privilege to be in that position. That proves our approach is effective."

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