

Promotion

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“We’re not just money managers,” says enRich Private Wealth Management Co-founder Judy VanArsdale. “For us, it’s not just about balancing portfolios and talking about returns.” In fact, for VanArsdale and her partner, Ursula Daley, the most important part of meeting with a new client doesn’t involve talking about money at all.

“It’s about building a relationship with the client,” says VanArsdale. “We want them to be completely at ease with us. If they don’t feel comfortable talking to us about their finances, it’s not going to be a successful relationship.”

“We spend as much time as possible talking to the client, and more importantly, listening to our clients. Understanding where they are and where they want to be is the most important component in building trust with them,” says Daley. “Until we’re confident we understand as much about their financial situation, if not more, than they do, we don’t even begin discussions about what to do with their portfolio.”

Even then, Daley and VanArsdale work to take the relationship further. “We seek to achieve a partnership with each client,” says Daley, “one with active participation.” Often, that means providing educational opportunities so clients can fill in gaps in their financial knowledge or have a greater understanding of the current economic situation. “We believe educating our clients empowers them to become more involved in their own financial future,” says VanArsdale. In addition, Daley and VanArsdale believe their business has fared well through the economic downfall as a result of the research capabilities of their broker/dealer, LPL Financial, and the alternative investment strategies LPL Financial has provided and their firm has embraced.

Building on Their Backgrounds

The partners also conduct a thorough analysis and evaluation of every new client’s existing portfolio. Their backgrounds are unusually suited to this task. VanArsdale has a highly regarded analysis background, which is invaluable when it comes to identifying gaps in financial plans. And Daley has a legal background that provides her with a unique perspective on the various risks faced by clients as they move through life. “We look at more than just their financial plan,” she says. “We encompass life strategies and approach planning in a holistic manner.

“For instance,” VanArsdale continues, “someone can have a really great financial plan, with just the right amount of money to live comfortably in retirement. But if they don’t take into consideration the possible need for long-term care, their entire portfolio can be put at risk.

“And the analysis doesn’t end once a plan is in place,” she continues. “Life is always changing, so we go the extra mile to ensure all our client relationships are ongoing, that we’re kept up-to-date as each client goes through the various life stages.”



VanArsdale and Daley recently surveyed enRich’s client base to gauge the level of satisfaction with the firm. While most clients acknowledged the partners’ money-management skills, nearly all of them indicated it was the personal relationship they’d built that kept them coming back. “They praised our accessibility and our professionalism,” says Daley. “But more importantly to us, they praised the fact that we treat them like people, not portfolios.”

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