

What are we thankful for? November 28, 2018



The passing of the Thanksgiving holiday and preparation of the forthcoming Christmas season prompts me to sit back and think about the blessings in our lives, many of which we take for granted. These include our family, friends and co-workers, the shelter over our head, the clothes on our back, the freedoms we enjoy, and even the small things in life like a smile from a random stranger passing by. As a firm, we are grateful for the comradery of our team, the enjoyment we derive from our work, and most of all, the confidence you have shown in our firm by allowing us to work with you and your family. We are blessed to be in a position to guide and consult you on your circumstances and allow us to participate in the joys, and sometimes the sorrows, in your life. You see, Voisard Asset Management Group gets to live part of our lives through the lives of those we serve.

Over the last few years, we have experienced material growth in our business. For that, we thank you for allowing us to help you and for referring those in your lives that need a trusted advisor. Given our growth and success, and the many new clients that have joined us over the past few years, I wanted to tell you our story that started in 2002.

Prior to 2002, I was working in the trust department of a large regional bank. I enjoyed the position and the opportunities it provided but was growing tired of the politics of a large organization, the “grow at all cost” mentality and the limitations of investment selections permissible. While my client’s best interest was always the most important thing to me, it was not always the focal point of those to whom I reported. To compound these issues, the bank was experiencing a merger and I wasn’t thrilled by the new management and culture.

Many times over the years, I had expressed my interest in starting a business to my wife, Julie. I was tired of red tape, pointless meetings and thought that wealth management could be done better. Pure and simple, I wanted to help clients. At the time, starting my own company seemed like a dream. With the stability of the large organization behind me and the responsibility of supporting a wife and three small children, leaving was difficult. Julie, in her infinite wisdom and confidence, encouraged (and pushed) me to start the company. In 2002, after finally deciding to listen to her and others, Voisard Asset Management Group was born. We started with a handful of clients, a few million dollars in assets under management and some elbow grease. Those of you who were with us from the beginning, thank you for your confidence and the opportunity to get it started.

As we began to grow, I knew we were on to something. We were treating people like we would our own family, encouraging them make wise financial decisions and sometimes heeding them to use caution. Like a snowball, our method was catching on and people were being referred to us regularly. Then 2008 happened, which as most of you all recall, was not fun for anyone. We advised clients to stay the course and not panic, which was easier said than done. Through this storm, clients listened and came out on the other side better than before.

If we fast forward to 2018, we now serve over 250 clients, totaling assets of about \$170 million. We have three CERTIFIED FINANCIAL PLANNER™ professionals on our 7-person staff and serve clients in 18 states. With each new client, our approach as a fiduciary is simple and we ask ourselves one question, “Is this in the client’s best interest?” Our objective is to craft a strategy that is appropriate for your specific financial goals and to simplify the complex and emotional nature of investing into a disciplined approach. This is done through a process of open and ongoing communication.

As I look back to 2002, starting Voisard Asset Management Group was the best decision I ever made (besides marrying Julie). As humbly as I can state it, thank you. Thank you for trusting us and thank you for referring friends and family to us for assistance. Enjoy the upcoming holiday season and keep in mind the things that bless your life and the lives of those around you.

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