

Our New CEO!

We have important news! At the annual meeting of our corporation, Ted was elected to assume the role of CEO, in addition to the role of President. Congratulations Ted! Bob will continue to serve as Chairman and will remain active in the practice, he tells us, until there are no more uncertainties in the financial markets or problems to be solved.

Anniversary Edition

2019 is an anniversary year for us, for many reasons. It all began when Bob met Dorothy 40 years ago this Fall. He was a new employee at a local bank, and she was his first supervisor. Some roles never change.

Bob entered the financial services industry in 1982* (37 years ago, but who is counting?), and Dorothy joined him as an assistant in 1984. Bob spent 6 years with a national planning firm,** and then a year with a traditional Wall Street brokerage firm. Those cultures were too sales-oriented, so Bob decided he needed to run the business "his way." In 1989 (30 years ago!) Bob became an independent financial advisor and formed the business entity that has become Advanced Wealth Management.

It was in 1999 (20 years ago) that Bob affiliated with Commonwealth Financial Network, who remains a valued partner in our mission to provide our clients with the best possible wealth management. Commonwealth itself is celebrating its 40th anniversary in 2019.

15 years ago, October 2002, Linda Heintz joined our firm. She wanted to work 4 hours a day, 4 days a week. You can see how that turned out! This October we awarded Linda our 15-year anniversary recognition, a specially designed pendant. Congratulations, Linda!

Other milestones are that Ted began working in the business in 1993, when he was 8 years old. (Why did we wait so long?) And maybe his son Sebastian will join the firm at his age 23, in 2039, which was Ted's age when he officially joined AWM. 2039 would then be the firm's 50th anniversary!

Veronica joined us in 2008, Traci in 2009, Becky in 2010, and Lindsey in 2011. Eventually we accepted that we needed to add one more team member, and so Reanna joined us in April, 2018. Later, in August of 2018, Traci became our third financial advisor. At this time our team is fully staffed, trained, and as always, ready to assist our clients in achieving their financial goals. We are grateful for the opportunity to have worked with you and your families over these many years.

**The Dow Jones Industrial Average was about 770 in August, 1982, when Bob entered the financial services industry. Today it is close to 27,000, a dramatic 37-year run!*

***In 1988 Bob and Dorothy were offered what seemed like a great opportunity in Champaign, Illinois, to solve a serious company problem. One year later the problem was solved. The company then wanted to change Bob's terms of employment, and Ted, who was then 3, referred to a freeway overpass as "a mountain." Dorothy and Bob decided then it was time to move back to Portland!*

Happy Thanksgiving!



Account Aggregation

You can now add outside accounts (i.e., accounts not with our firm such as 401(k) accounts) to Investor 360° to see all of your investment accounts in one place.

Log in to Investor 360° and link your outside investment accounts as "Additional Assets." If you have questions or need assistance, contact our office!

Click the button below to log in and get started!





Building for the Future

On anniversaries such as we are celebrating here at Advanced Wealth Management, it is an opportunity to both reflect on the past and plan for the future. We have had many exciting developments over the years, most recently with Reanna joining us as our 9th team member and Traci stepping into the role of advisor. In the last year we have also been hard at work building our infrastructure, improving our capabilities to best serve you, and increasing our flexibility, all without needing to increase your costs!

For example, we have been using DocuSign for electronic signatures more and more with clients, often shortening the time that it takes to get paperwork processed and saving trees in the process! When we can't meet in person, we have been having excellent conversations with clients via video conference software, which can allow us to see each other via video chat, and/or share our screen so that we can use specific reports to deepen our conversations as if we were in the same room. Until recently we could not use text messages for regulatory reasons, but now we are set up to be able to communicate via text if that works best for you (feel free to text us at 503-452-9300 to let us know that you read this!). We have incorporated new financial planning tools as well as investment research and management software to optimize our process.

Going forward, we will continue to survey the industry to make sure that we have the cutting-edge tools to best serve you and help you achieve your goals, both financial and otherwise. As we continue to add wonderful people to our extended Advanced Wealth Management family, we will likely see constant change. We may need to add a tenth team member (or more!), and/or we may need to expand our office space again or move to a new location. Whatever changes the future brings, we are excited for our continued growth and progress, and are looking forward to seeing all the wonderful developments that the next 30 years will bring!

Be sure follow us on Facebook and LinkedIn, so that you can receive updates like these as soon as we announce them!

Also, as a fun side note, we wanted to share an interesting astronomy article. As you may have guessed, this section of our newsletter has been titled "Haleys' Comments" as a nod to the famous Halley's Comet, one of the more well-known celestial visitors to our skies. Halley's Comet last passed by Earth in 1986, and will not return until 2061. However, as it turns out, particles that the comet left behind are visible twice per year, and we just passed a period where the meteor shower they created could have been observed. What we found fascinating was that the two times per year that these meteor showers are visible are in May, which coincides with Ted's birthday, and October, which coincides with Bob's birthday! While we have no genealogical relation (that we know of!) to the astronomer Edmond Halley, for which the comet was named, there definitely seems to be a connection!

If you are interested in reading more about the comet and when you can best view the meteor showers, [click here](#) for a link to an article in Forbes.



Connect with Bob



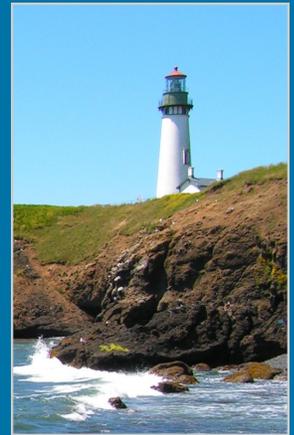
Connect with Ted



Connect with Traci



AWM Website!



Click here to visit our website



Office Closures

Thanksgiving
November 28th & 29th

Christmas
December 25th

New Year's Day
January 1st

MLK, Jr. Day
January 20th

Presidents' Day
February 17th

Q & A with Bob Haley

What influenced you to enter this business?

I was in my mid-30's and no longer wanted to practice law but needed a profession where I could feel I was making a difference in the world. I was offered a position in the financial services industry, with a company that advertised its commitment to financial planning. I accepted, and then quickly learned that the focus was on sales, not planning. I stayed with the company but made a decision to treat my business as a profession. I had a very slow start, but I could see that I was in a unique position to help people in profound ways. Sound financial management allows individuals to achieve their life goals, and to provide resources for future generations to have freedoms and opportunities that otherwise might not be available. Thus my career became both a mission and a passion.

What are you most proud of?

I am most proud of my family and circle of friends, of the relationships with my clients, and of the depth, strength and delight of my associates at Advanced Wealth Management.

What has surprised you most about this profession?

What has most surprised me in the beginning, and does to this day, is the extent to which sound financial management can influence – for the better – present lives and future generations. A second surprise is how much mainstream financial services firms continue to resist the concept of "fiduciary." What can be so problematic about always putting the clients' interests first?

Is there a professional goal toward which you are still striving?

There are two goals. The first is to help assure that Advanced Wealth Management can continue to thrive, and if I live that long, I would love to see it celebrate its 50th anniversary. On a more technical level, I continue to study how we as professionals can continue to get better at decision-making, and be better at helping our clients make well-informed decisions.

If you could go back and talk with yourself in 1982, what advice or warning would you offer?

Advice to myself, and to everyone else who will listen, is to recognize that "Things Change." People and their needs and goals change, laws change, business models change whether you want them to or not, and in the investment world, change is happening literally by the second. Part of the reason I love what I do is that I love anticipating and reacting to change, and helping clients and team members do the same.

What do you look for when hiring a new member of your team?

We want team members who are ethical, who have effective and cheerful communication skills, who are good and constant learners, who have attention to detail, who are hard workers, who are committed to each client's best interest, and who I would be proud under any circumstance to introduce as an associate in my firm.

Advanced Wealth Management
10220 SW Greenburg Road, Suite 210
Portland, OR 97223

Phone: (503)452-9300
www.advwealth.com
Hours: 7:30am—4:30pm, M-F

Securities and advisory services offered through Commonwealth Financial Network, member FINRA/SIPC, a Registered Investment Adviser. Financial planning and advisory services offered through Advanced Wealth Management, a Registered Investment Adviser, are separate and unrelated to Commonwealth.

