AS SEEN IN southbay magazine

TRUSTED ADVISORS 2015

Shawn V. Gruver, CFP®, Managing Director – Investments & Senior PIM Portfolio Manager
John Szymura, Financial Advisor
Natalie Broderick, Senior Registered Client Associate

Gruver Wealth Management is part of the full-service financial firm Wells Fargo Advisors, LLC, which offers high-end wealth management and investment planning services. Managing Director – Investments, Senior PIM Portfolio Manager and LA native Shawn Gruver attended the Marshall School of Business at University of Southern California and graduated as a Renaissance Scholar. Prior to his current position, he was a Vice President and Senior Portfolio Manager at UBS. His tenure also includes Morgan Stanly as an Associate Vice President and Portfolio Manager, as well as Paine Webber, where he began his career in 2001.

How do clients benefitfromworkingwith your team?

"Communication is the key to any successful relationship. Our clients build a partnership on the foundation of transparency and honesty. Working together and sharing responsibility, we identify their goals and dreams; only through effective communication can these objectives be achieved."

Give us a great piece of advice on how to protect ourselves and our families.

"As life expectancy continues to rise, so does the likelihood that the children will inevitably have to step in at some point and help the parents make fi nancial and other decisions. It is never pleasant to discuss one's mortality, but puttingo ffaconversation would mean that the children would be left scrambling to help protect their parents hard-earned assets. Becoming more aware now and working to put a succession plan in place will help ensure that the parents' financial decisions are handled in a way that reflects their wishes."

> **FAST FACT**
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> Shawn spends his free time traveling the world, plays beach volleyball and is an avid freestyle skier.

What questions or concerns do you hear frequently from clients?

"'How should my investments be allocated to minimize volatility?' The key to successful investing is to define your goals, be steadfast and patient in achieving them and focus on the big picture. This discipline includes recognizing that there will be a broad range of performances by—and among—the different asset classes. Inevitably some investments will experience negative performances as others ascend or stay flat."

Do you offer free consultations for new clients?

"All initial consultations and proposals are free until a family starts working with our group; then we can structure the compensation in a way that the client feels is the most appropriate for their situation."

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