AS SEEN IN southbay magazine

FINANCE & WEALTH MANAGEMENT 2015

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

GRUVER WEALTH MANAGEMENT OF WELLS FARGO ADVISORS

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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 Los Angeles 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, an Associate Vice President and Portfolio Manager at Morgan Stanley, and a Financial Analyst at Paine Webber, where he began his career in 2001. Shawn lives in Hermosa Beach, where he enjoys playing beach volleyball. He spends his free time traveling the world and is an avid freestyle skier.

Why do you believe clients choose you?

"Clients hire us because we focus on the importance of who they are and what they are trying to accomplish; assume the burden of the day-to-day work necessary for the successful achievement of their financial goals; have an unyielding work ethic and 22 years of cumulative wealth management experience; and we earn their trust once—and work every day to keep it."

What's the most common mistake people make with their money?

"We believe too many people are willing to accept the status quo with their advisor. We see too many portfolios where inertia turns one year of mediocrity into five years of poor performance. We know that money is hard to make and harder to keep, so we help make sure it is managed properly."

What is your process?

Our process includes four steps for all clients. (1) Developing Your Wealth Strategy: We learn and define your goals and objectives and then construct a detailed investment plan with multiple solutions that addresses your key wealth management issues. (2) Presentation: We present, review and refine your investment plan and solutions. (3) Implementation: We complete paperwork, fund accounts, explain mailings/statements, and set up online access. Most importantly, we ensure that you understand each step and are comfortable throughout the entire process. (4) Communication and Reporting: On a monthly basis we review and update performance; summarize economic outlook and review investment strategy; and contact you to address any outstanding administrative issues. Each quarter we conduct an in-person comprehensive review of your financial and investment allocation."

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Investment and Insurance Products are:

- **Not Insured by the FDIC or Any Federal Government Agency**
- **Not a Deposit or Other Obligation of, or Guaranteed by, the Bank or Any Bank Affiliate**
- **Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested**

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