AS SEEN IN southbay magazine

TRUSTED ADVISORS 2017

trusted advisors

Gruver Wealth Management of Wells Fargo Advisors

Shawn V. Gruver, CFP®
Managing Director–Investments &
Senior PIM Portfolio Manager
2321 Rosecrans Ave., Suite 2275, El Segundo
shawn.gruver@wfadvisors.com | 310-725-2267

Gruver Wealth Management is led by Shawn V. Gruver and is part of the full-service financial firm Wells Fargo Advisors, which offers high-end wealth management and investment planning services. Since joining Wells Fargo Advisors in 2014, Shawn has been recognized as a Premier Advisor every year from 2014-2017.*

What's the secret of your company's success?
"We want to help those who want to be helped. We assist clients in growing their assets and educate them on protecting their most important asset—their family's financial well-being. We take the time to understand clients' needs, goals and dreams for themselves and their families. This deep understanding—combined with our powerful global resources—lays the foundation for a strong, enduring relationship."

What goes on during an initial meeting with a prospective client?
"First meetings are complimentary and in-person. We discuss their financial situation and identify concerns they may have. If it's a mutually good 'fit,' we then schedule a follow-up to start the planning process."

What type of investment philosophy do you believe in: active or passive?
"When it comes to investing, there's no such thing as a one-size-fits-all portfolio. We believe our clients benefit from a combination of active and passive strategies. That's why we offer both and construct custom portfolios for each client."

What are some common issues people have with wealth management?
"Their understanding of risk and how it applies to their overall financial well-being. The three most important aspects to modern-day investing are risk, time and compound returns. If clients are going to be successful—with the longevity we have today—they have to embrace all three and understand them."

How does being a CERTIFIED FINANCIAL PLANNER™ professional impact your work?
"Being a CFP® professional gives my clients an added sense of security as an 'advisor you can trust'—and I'm proud to believe I've earned my clients' trust."

*Disclaimer: *The Premier Advisor distinction is held by a select group of Financial Advisors within Wells Fargo Advisors as measured by completion of educational components, business production based on either of the past two years, and professionalism. Additional criteria, including length of service, may also be used to determine recipients.*
Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, Member SIPC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company