

Our Ideal Client

I fit squarely into the "new parent(s) or career professional in the middle stage of their lives" camp. My family includes a beautiful wife and two adoring children (ages two and four). Obviously, we share many of the concerns of others in our demographic. We currently do or will face many of the same questions and decisions others in our group have already experienced. Who's taking the children to school? The doctor's? Baseball practice? Soccer camp? How will we pay for our children's colleges? Anyone know a reliable baby sitter? Are we prepared for retirement (not yet)? Have we saved enough? Are we spending too much? Is there a better option than passive investing? Are we maximizing our wealth generation potential? We acutely know and have faced many of the same challenges afflicting others in this group and have experienced many of the same pleasures as parents.

I come from a family of first generation immigrants. My parents, brothers, and I immigrated to the United States in 1975, when I was two years old. We escaped a terrible situation in Cambodia without much except for the clothes on our backs. In this way, I think I embody the American dream, hoping to provide a better future for my family and community. Not to be outdone, my wife more recently emigrated with child from Europe and her native Poland to join me. Our children have two first generation parents who separately immigrated to the United States in search of a better life for themselves and their family. We are better people for having experienced what we have and are blessed to have had such opportunity.

I spent several years working in investment banking, helping entrepreneurs move on to the next stage of their lives by selling or monetizing their life's work. These individuals were very proud and passionate about their accomplishments in business. They took great risks to be able to position themselves and their family for a better life. Having just started a new investment advisory business, I now fall myself into the camp of entrepreneur. I am also trying to provide for my family and believe that this new career path is the best way to do it. I am probably experiencing many of the same challenges that many other entrepreneurs have faced in starting their own businesses. I know about the personal sacrifices that they have made, and the hard work required. Having followed the same path, I am familiar with the risks involved and the potential rewards.

Family, immigration, and entrepreneurship are natural connections that uniquely place me in a position of empathy and understanding for the many others who've had similar life experiences. I have a strong background and experience in investments that I would like to share with others who have walked a path similar to my own. I would appreciate the opportunity to contribute and share any of my own experiences. There are many stories to tell and insights to exchange. I enjoy hearing everyone else's stories about their families or business/career endeavors. This is what I am passionate about and this is what excites me. Please reach out to me if only to talk about our families. I want to find out more about you and understand you better. Let me be of assistance in any way possible.

Warmest regards,

Tim