QnA Interview with Acclaimed Financial Adviser Shãn Sutherland

Shannon "Shãn" Sutherland is a financial planner and discretionary portfolio manager at Simple Impact LLC.

Shãn Sutherland, Wealth Advisor at Simple Impact LLC

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Q: Greetings Shãn. I want to start by asking you when you first became interested in becoming a wealth adviser?

A: It was during a three-day temp position I took over the holiday season. A month after completion, out of the blue, the lady I worked for called me up and said, "Shãn, we had great chemistry. Come run my business." She then offered me a job that blew my mind and ever since then that's what I've done.

Q: What year was that?

A: 1999.

Q: What was that original job?

A: It was an executive assistant job in a financial business.

Q: Through that experience, you started the journey of becoming a financial adviser. What was appealing to you about that line of work?

A: It chose me more than I chose it. At the time I transitioned from a career in film editing. But it was such a good offer that I figured I would give it a try. Six weeks after starting, my role abruptly changed.

Q: That became your training by fire. How long have you been a wealth adviser for?

A: My titles have evolved over time. I've been in the industry of giving financial advice for twenty years.

Q: How has the world of wealth advising changed in the last twenty years?

A: There's a lot more women in it now, and the people I've chosen to surround myself with are high-quality smart people. When I started out, I was surrounded by people that carried that "wolf of wall street" vibe. I was horrified. Absolutely horrified by all the lying and clandestine activities I witnessed.

That changed when I read my first personal financial plan. It was an intimate activity because I could see how it was going to help a person. The industry today is now more focused on providing real solutions for people. In part because regulations have come down hard in many areas of this business to make sure professionals put the interest of their clients' first.

Q: When people select wealth advisers, what is the biggest mistake they often make?

A: Chasing investment return is a big mistake. Choose the right adviser by looking at the overall business model including their service and philosophy.

Q: So, when things "sound too good to be true," they often are?

A: There's some really good investments out there, but it's important to recognize that investment style, like growth or value, means great returns every single year won't happen. There's going to be bad years as well as good ones.

Q: What is it that you do for your clients that is unique and special to your personal style?

A: My personal style is that I always start with a one to two page document where I outline our conversation we originally started with. Who you are, what the immediate issue is, what you want in your financial future? I outline that the very first-time clients meet with me.

The ongoing relationships I use common sense, technology, and practical financial tools. It's great for the client and provides check points to make sure I've done my part, to help them with their goals.

Q: One last question, how does being a good listener contribute to the craft of being a good wealth adviser?

A: Being a good listener is critical. In any business activity. You must hear what your clients need or are really asking for.

Q: That about covers it. Thank you so much for your time today.

A: It was a pleasure.

BIOGRAPHY:

Shannon "Shãn" Sutherland is a financial planner and discretionary portfolio manager. Her knowledge of how money works helps executives and Sr. creative professionals through financial transitions to retire with dignity.

As a veteran Wealth Adviser and Founder of Simple Impact LLC, Shãn advises other fiduciaries on the CalSavers retirement savings program and employer 401(k) retirement trusts. Simple Impact LLC partners with Commonwealth Financial Network®, to provide retail investments and consulting, Member FINRA/SIPC, A registered Investment Adviser.

Sutherland holds many financial credentials, most uniquely, Accredited Investment Fiduciary and Accredited Domestic Partnership AdvisorSM. She began her investment career in 1999 and earned a personal financial planning certificate from UCLA in 2007. She is active with LAGLCC.org, AAUW Thousand Oaks (CA) branch, and 2020WOB.com Women On Boards.
A woman of many talents, Shãn Sutherland was featured in Forbes2 print magazine 2017 Women Business Leaders California edition. In 2013, 2016, 2017, 2018 and again in 2019, she was recognized by Los Angeles Magazine as a Five Star(SM) Wealth Manager3. In 2019 she was included in L.A.'s 100 most Fascinating People list.

Services provided by Sutherland include Money Coaching, financial analysis, and Portfolio Investment Services. She applies E.S.G. Environmental Social and Governance investment filters including emphasis on women's' contribution to corporate decision making.

Currently, she empowers local women business leaders by facilitating gatherings with intimate powerful conversations. She is an avid golfer and outdoor enthusiast.   Join the Simple Impact LLC community and receive wealth wisdom delivered to your email by signing up here https://bit.ly/2KLPHx1.

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