

BIRMINGHAM BUSINESS JOURNAL

RISING STARS IN MONEY

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What's your career highlight so far?

Being named vice president of such an established firm is very humbling and exciting. Also, launching GenNow Medical, a program to assist young health care professionals with their financial needs has been an exhilarating new challenge.

What's your ultimate career goal?

I would like to continue to grow and lead our firm to the next level. Our industry is changing rapidly, and I see continued opportunities to adapt and innovate in order to serve our clients efficiently and yet personally.

What's your dream job? I guess it's too late for the NBA? Actually, I love what I am doing and I can not imagine doing anything else. I get great personal satisfaction from helping others. However, owning a professional sports team or being a travel blogger would be pretty cool.

What's the biggest challenge facing your industry in the long term?

Keeping up with the rapid advancement in technology, and differentiating yourself from your peers. Being able to show why and how you are unique and can add value will become more and more important. Be proactive versus



reactive.

What's the biggest opportunity facing your industry in the long term?

Technology and digital efficiency will continue to be huge game-

changers, allowing advisers to broaden their areas of expertise and focus more on the client experience. The wealth transfer of approximately \$30 trillion will also provide opportunity.

What do you think will be the biggest changes in your industry over the next 10 years?

As the public becomes more astute and discerning, the Registered Investment Advisory business model will continue to grow. Fiduciary duty, transparency and flexibility will become the standard.

What's the most important factor for you when it comes to having a satisfying career?

Enjoying the now. Success and satisfaction in your career will come if you love the process of getting there as much as the reward. I will feel good knowing that I gave it my all every day for my clients and for my business.