

Advisor Highlight Series

Featuring Sara Brandston

The Advisor Highlight Series features the unique insights and successes of advisors who use the AssetMark platform. In this series, we sit down with advisors to get their professional views on practice management, industry trends, and what they have learned over the course of their work to help clients reach their personal and financial goals. We hope you enjoy this chance to learn from your peers!



This latest installment features insights from Sara Brandston, Enrolled Agent and head of The Sara Brandston Group, Inc., who discusses her unique client niche, how she brings investors peace of mind, and her goals for keeping client relationships strong for the long term.

Q. Tell me a little bit about the demographics you work with. In other words, how would you define your client niche?

My clients are everybody from advertising professionals, to nurses, to lawyers, to people in the music business – it’s a diverse group. In general, the clients I appeal to are those who appreciate my forthrightness and honesty. I like to be an educator, and I am very casual. I help calm people’s worries with my strong convictions about how markets work over the long term, and by extension, how that applies to their goals and their timelines.

Q. How do you think advisors can bring clients peace of mind?

Advisors should ask questions that contribute to a well-rounded plan, even if they’re not the ones who can answer those questions. They should ask about all the issues relevant to a client’s goals, and be able to refer the client to assistance for everything from legal, to investment, to tax, to life issues. It’s important to take into account who people are, and what their goals are. It’s not just about what advisors can do to get remuneration – it’s being somebody the client knows they can approach with any question.

Q. Can you give some examples of when you had to deal with a difficult client issue?

A husband and wife once asked for my guidance because they had different comfort levels with spending what they had in their portfolio. The wife was worried about running out of money, and the husband wanted a plan that would allow him to spend. So, I created a plan that had two different kinds of investments – one to

Advisor Highlight Series (CONT.)

Featuring Sara Brandston

work for years 1-10, and the second to work for year 10 through the death of the second spouse. I was able to get close to what the husband wanted, but still had some flexibility for years in which he might have to compromise. I also strongly urged them to think critically about their spending across the board. I tried to be both hard and soft at the same time, to lead them into a compromise. Fortunately, they were happy with the final plan.

Q. What is the biggest challenge you've encountered in client interactions? How are you working to overcome that?

I don't give individual clients enough of my time – I'm trying to work on that. I became a grandmother in 2017, and I'm trying to slow down. That means having fewer clients and giving more time to each. I'd like to be able to use all of the knowledge I can offer more thoroughly with each and every one of my clients than I'm doing now.

AssetMark, Inc.

1655 Grant Street
10th Floor
Concord, CA 94520-2445
800-664-5345

The views expressed are those of a third-party, provided for informational purposes only, not a guarantee of future success, and subject to change. The above mentioned advisor and firm are not affiliated with AssetMark, and should not be viewed as an endorsement.

AssetMark, Inc. is an investment adviser registered with the Securities and Exchange Commission. ©2018 AssetMark, Inc. All rights reserved.

C32856 | 03/2018 | EXP 9/30/19