

Michael Mrotzek, CFP, CRPC, FWA, IPD

In the 2009 Sandra Bullock movie, “The Blindside”, Sandra’s character helps a young, inner city football player recognize his full potential. She identifies Michael Oher’s Protective Personality which makes him perfect to play the weak-side Offensive Guard position on the team. His job is to watch over his teammates, always protecting their blindside. Like Michael Oher, I seek to protect my client’s blindside. I help them manage their investment portfolios in a manner that reflects their risk tolerance as well as the level of return they require in order to meet their financial goals. I help them separate the facts from the noise in the financial media and offer solutions that I feel best reflect their needs. My overall goal, however, is that my clients consider me to be their first stop for anything of a financial nature, whether they have questions about an investment account or are unsure of how to proceed in a more general life question. I am committed to look out for them as I would my own family.

During my career, I have striven to continually educate myself so that I am able to help my clients meet their financial needs; even those they did not know they had or might have in the future. I earned the CFP designation (Certified Financial Planner) in 1993 in order to better understand how to guide my clients regarding investment, insurance, tax and estate planning strategy issues. According to the CFP Board, only 25% of all financial advisors have the CFP designation which requires a strict adherence to ethics. I have also earned the CRPC (Chartered Retirement Planning Counselor), FWA (Family Wealth Advisor) and IPD (Insurance Planning Director) designations which all reflect my commitment to individual retirement clients, their family dynamics and their specific needs regarding wealth transfer to the next generation. I believe these credentials and the strict oversight required to keep them, can give my clients the highest degree of confidence that the recommendations they receive from me will always reflect what I think to be in their best interests

In addition to my experience and investment process, my Senior Registered Client Service Associate, Noreen Burkle, and I strive to provide our clients with a service experience that exceeds their expectations. We make ourselves available for frequent phone calls and in-person meetings, collaborate with our clients’ tax and legal advisors and are proactive problem solvers, all to maximize our client’s positive experience with our team while simultaneously minimizing any inconveniences. I believe it is because of our teamwork that our clients look at us as their most important financial resource, using our knowledge to advise them in all aspects of their financial lives from rolling over a 401K, purchasing or refinancing a real estate property, selling or taking their company public, dealing with the divorce or death of a spouse, protecting assets from long term care expenses and other important planned and unplanned financial decisions.

We find that our practice is a good fit for successful individuals, families and small business owners who recognize the value in relieving themselves of some of their financial concerns. Our clients can now focus their attention on life’s other priorities, knowing that they have a Financial Advisor who will help them build wealth during powerful bull markets, protect their blindside in challenging bear markets, and care more about their money than anyone who does not share their last name.

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