

Advisor Highlight Series

Featuring Beth Jones of Third Eye Associates, Ltd., a Registered Investment Adviser

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!



1. How did you start your career in Financial Services?

Over 20 years ago, I started working for a firm that served the LGBTQ community because I wanted to make a difference in my client's lives. In 2005 my wife Susan and I created Third Eye Associates, Ltd. to provide clients with a holistic approach to Financial Life Planning and wealth management. We currently have offices in New York and Washington, DC.

2. What is unique about your approach to financial advice and why do you value this process?

Our approach is client centric; every plan starts with the client's vision. We studied at the Kinder Institute, and the Sudden Money Institute where I have been participating in the evolution of the Financial Transition work for 14 years. The Financial Transition training is designed to help clients who are experiencing a life transition such as divorce, death of a spouse or loved one, inheritance, retirement, health issue, or other major life event. We do a deep discovery process over several meetings to understand our clients' fundamental values, who and what is important to them, what obstacles get in their way, and build financial plans and life visions around that. For implementation, we match our client's goals to their money and their values. We believe the secret to having what you want in life comes from how you relate to your money. We want clients to understand how they relate to their money so they can learn to spend it with purpose and intention.

3. What financial education do you think is essential for clients?

I work with a lot of artists, actors and creative people. They tend to have an aversion to money and fear it or don't want to talk about it. Even if they have money, they worry about losing it, or running out of it. Money is a great tool to attain what you want in life. Once the infrastructure is in place, clients can relax a little knowing money isn't so scary and learn how it can grow and work for them.

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4. What advice do you have for younger investors who have seen so much disruption?

Young people are more freaked out about not having a financial plan than some 50-year-olds with \$200 in their accounts. Most believe that social security won't be there for them; they want to invest, but are conservative when it comes to markets. We help them understand how earning even 4-5% compounded interest impacts their future balances. Once we create a financial plan with them, they see how their decisions impact their cash flow and their ability to build wealth. It's not only about income—the budgeting matters.

5. What legacy do you hope to leave behind?

Susan and I are both very active in our community. We've volunteered with many nonprofits in our town and we bring different interests and expertise to our board positions. Being part of an organization and seeing something blossom that you began working on years ago is very rewarding.

When we were in New York I worked to support marriage equality as well as other causes. It was an opportunity to impact the movement toward legalizing same-sex marriage. When the government doesn't recognize your relationship, it impacts estate planning, taxes, insurance, and raising a family. With all the changes in the law and the tax code there's still a lot that needs to be addressed, and we are staying on top of that for our clients.

I'm also very proud that we have built a sustainable business; our clients and associates appreciate the safe space to learn and understand how best to relate to their money.

I believe if we live with integrity and wake up trying to be better human beings, the world can be a much kinder place. It creates a ripple effect through society. Focus on where you can make a difference. There's a lot we can impact.

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