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Philosophy, People, Process

A three-pronged approach guides the success of WWM Investments, LLC, one of Chicago's leading boutique Wealth Management firms.

For Paul Gassel, CFS®, AIF®, founder and managing partner of Chicago-based WWM Investments, LLC, the continued success of his firm can be traced to a philosophy of service, a love of people, and a fine-tuned, highly individualized process that helps build financial security for his clients.

Paul grew up in the Chicagoland area and knew from a young age that he was destined for a career in service to others. "I have always loved people," he says. "My clients and their families become my friends; it's an honor and privilege to care for their financial lives."

With close to $1 billion in assets under advisement, Paul and his team work primarily with carefully curated, high net worth individuals and business owners to implement wealth management, investment, retirement, and risk management strategies tailored to help provide long-term financial strength and security.

THE PATH TO A PLAN

When working with clients, Paul dives deep to understand their financial situation and goals for the future.

"Many advisors have access to products and resources that can provide a traditional financial plan, but we go further, emphatically rejecting a one-size-fits-all approach. Our planning process focuses on collaboration and education," he explains.

Using a personalized multi-manager method, the firm rigorously researches a myriad of strategies and solutions to create offerings customized to each client's specific situation. "Our clients are unique people with unique needs and goals; their WWM financial plan reflects that—and adjusts as their lives and needs change," Paul adds.

KNOWLEDGE IS POWER

Part of Paul's work, particularly during what he terms "life after plan," is alleviating his clients' uncertainty, especially during periods of market volatility. The antidote to financial uncertainty, he says, is knowledge.

"Yes, markets rise and fall, but both present opportunities that I feel passionate about when educating my clients," says Paul. "Are they staying awake at night worrying about whether they can send their kids to college or whether they have enough money to retire? We discuss these questions and replace them with facts and clear plans. It's all about communication."

Paul says that both the size of his firm and its independence enable a luxe, high-touch experience. "Since its inception, WWM Investments has helped people create a dynamic financial plan at all stages of their lives and business," he states. "It's never too late to create a relationship with an advisor and to develop a plan that is meaningful and relevant to your goals. It all comes down to two simple questions: Where do you want to be,

"One of the most important choices you'll make regarding your financial security and success is not what to do with your money—it's whom to trust it with."

WWM
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