

Encouraging Clients to Stay the Course

Full-service advisors help keep clients on the road to financial wellness.

Over the course of a lifetime, countless obstacles threaten to pull prudent investors off the path to a comfortable retirement. Market swings, doomsday media reports, an unexpected illness—they can all spur investors to reevaluate their portfolios. “A trusted financial advisor can help keep you on a suitable path,” says Katherine Christoferson, CEO and senior financial advisor of McCollum Christoferson Group LLC. “It’s difficult to stay focused during those times, but that’s when advisors really show their strengths.”

With 122 years of combined industry experience, the advisors are skilled in guiding clients through the ups and downs. They are now managing the investments of third, fourth and even fifth generations of families.

Research-Based Approach

At the forefront of the firm’s strategy is an emphasis on individual stocks and bonds. The advisors spend an enormous amount of time researching individual equities rather than relying on mutual fund managers.

“We feel it’s important to know exactly what’s in our clients’ portfolios,” says Christoferson. “It’s an essential part of striving for portfolios that perform in accordance with clients’ expectations.”

The advisors go to great lengths to understand those expectations. Rule number one for Christoferson and her team is: “Listen and ask questions.” Throughout the first prospective client meeting, advisors emphasize building strong relationships rather than discussing portfolio strategy.

“It’s not about what we’re going to construct for you,” Christoferson says. “It’s about your needs. What kinds of things can we do to address your financial concerns?”

Taking the Reins

The firm’s high-service approach is particularly attractive to sudden-money clients and to those who lack the time or interest to manage their own portfolios. The advisors work closely to help clients assess their current financial picture and identify their goals.

“You can’t hit a target you don’t have,” Christoferson notes. “Certainly that target might change, but we need to put steps in place to help reach it. When life events occur, we can make changes to help get you back on track.”



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McCCollum Christoferson Group
Financial Strategies for Serious Investors

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