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India's Oldest Game Goes Pro; An Interview with NBA Commissioner Adam Silver; Peter Guber on Sports Tech



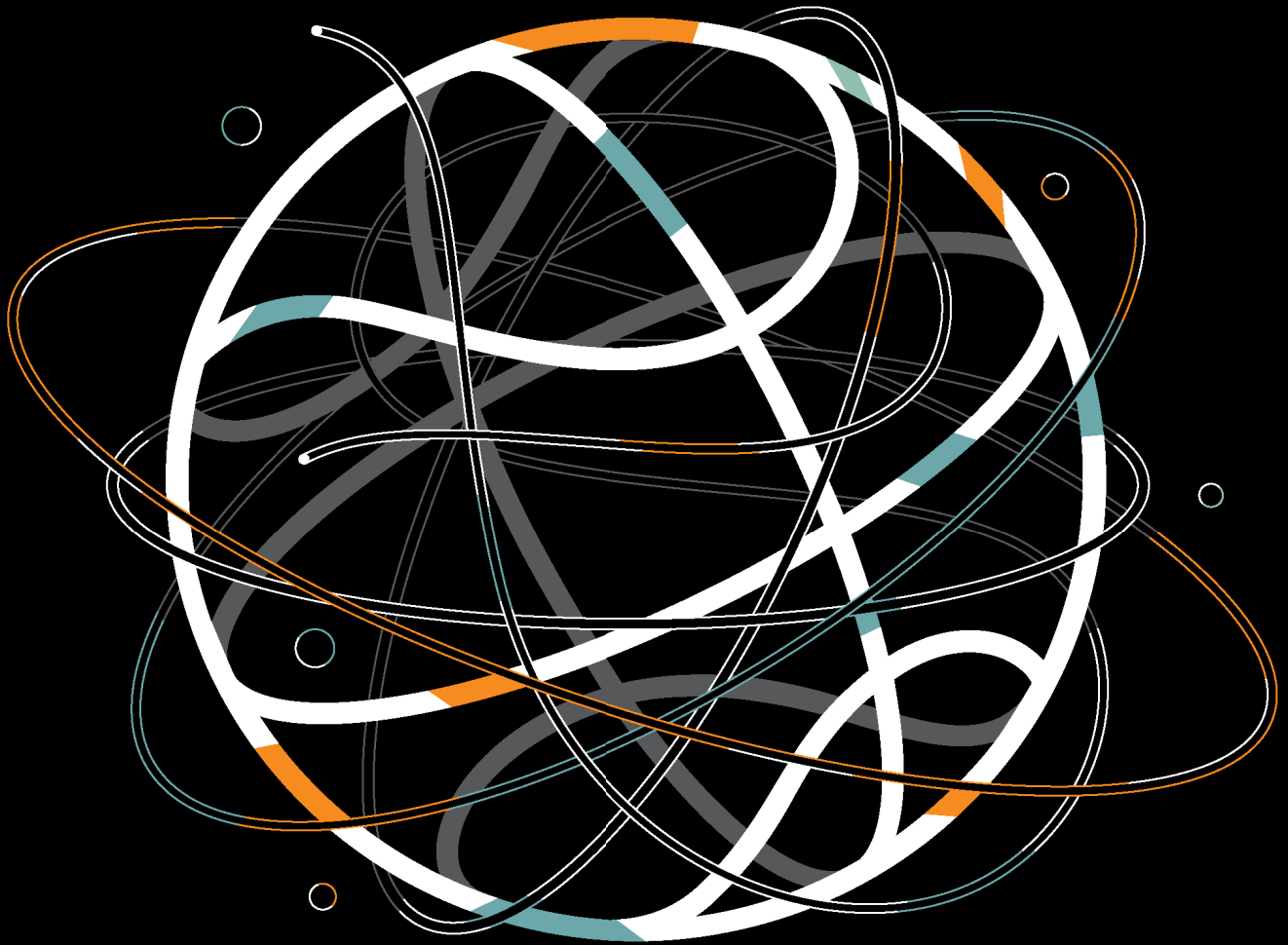
The Race to Be the World's Top Sport; 2015's Biggest Art Sales; How to Start a Sports Philanthropy



Ken Burns on Jackie Robinson; The Best Sports Watches and Spas; Should Your Child Play Football?

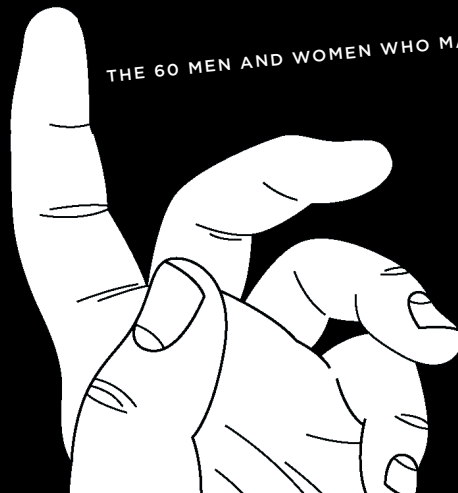
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GAME CHANGERS

THE 60 MEN AND WOMEN WHO MAKE THE WORLD OF SPORTS SPIN



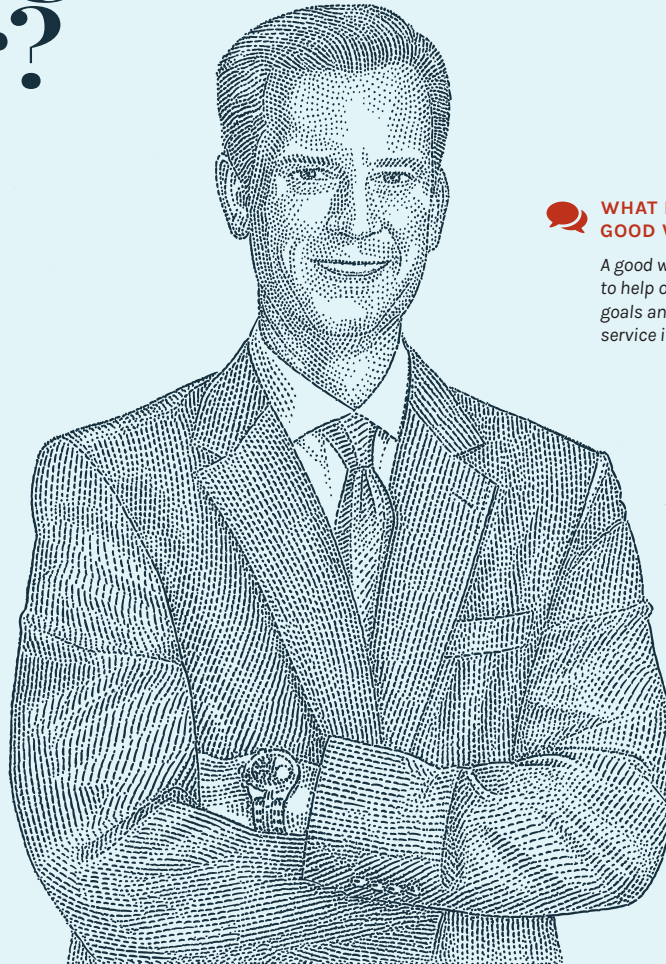
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What are the intangibles of selecting an advisor?

BY BOB TABOR



WHAT MAKES A GOOD WEALTH ADVISOR...

A good wealth advisor has the passion to help others achieve their financial goals and the expertise to deliver the service in a holistic manner.

RICHARD P. SLAUGHTER ASSOCIATES INC.

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FEATURED ADVISOR

Bob Tabor, AWMA®, AIF®, Vice President

ASSETS UNDER MANAGEMENT

\$400 million (as of 5/15)

LARGEST CLIENT NET WORTH

Confidential

MINIMUM FEE FOR INITIAL MEETING

None required

MINIMUM ASSET REQUIREMENT

\$500,000 (investment services)

COMPENSATION METHOD

Asset-based and hourly fees

PROFESSIONAL SERVICES PROVIDED

Planning, investment advisory and money management services; 3(38) fiduciary advisor

PRIMARY CUSTODIANS FOR INVESTOR ASSETS

Charles Schwab & Co. and TD Ameritrade

ASSOCIATION MEMBERSHIPS

Financial Planning Association, The National Association of Personal Financial Advisors, CFA Society of Austin, CFA Institute

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All successful relationships share some key traits. Trust and a true partnership are at the top of the list. This is true not only in personal connections, but also in your relationship with your financial advisor.

However, in today's fast-paced and increasingly digitized world, personal financial relationships are too often undervalued.

You probably have noticed the recent push to robo-investment advice, for example. This online wealth-management service provides automated, algorithm-based portfolio management advice without the use of human financial planners.

Yes, technology is a valuable part of finances. And yes, the results it provides

are easily measured.

Yet a personal advisor provides benefit—though measured differently—of equal or even greater value. To ensure that you and your financial professional have a strong and successful relationship, you should pay attention to the following three necessary and intangible characteristics.

TRUST

Trust is the cornerstone of all successful relationships. Most people who outsource the management of their investments likely trust that the entity they employ will do its



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best to provide the best return. That is absolutely measurable.

As your wealth grows, along with its complexity, the trust factor increases. Do you trust that your advisor will consider all your wealth needs, including those of your family? Do you trust that he or she will prioritize your best interests?

While it can be hard to measure these attributes, you can certainly examine your advisor's services, expertise, personality and company structure to help you make an appropriate evaluation.

PARTNERSHIP

When you find an advisor who expertly provides the services you need, another important requirement of them is a deep knowledge of your and your family's financial lives. Basically, the advisor must be interested in building a relationship with you.

It is from this relationship-based service that high-quality planning and execution is born.

However, I have too often seen individuals and their families grossly underserved by their advisor relationships because they are not true partnerships.

In order for an advisor to guide you toward an optimal financial situation, both currently as well as for the future, you must also invest in the relationship. You must share all aspects of your financial lives.

FAMILY CONSIDERATIONS

The advisor relationship you build should

also carry over to your heirs.

I have found that the most important thing to my clients is the financial stability of their families. In addition to ensuring the family's ability to meet current financial goals, clients are also interested in the future of their children and grandchildren.

This security goes beyond standard assistance with planning for college and trust/estate issues. It extends to your children's relationship with your advisor. A solid relationship will provide those children with the opportunity to enjoy the same trusted guidance, communication and education throughout their lives.

The education we provide the children of clients, no matter what their age or station, is a main reason behind our clients' satisfaction.

However, I am rarely asked by a prospective new client if we provide this service. But as you interview potential advisors, make sure you get a detailed report of all the support they can give to your family.

While traditional and easily measured aspects such as performance data are important, along with staff members' professional designations and their experience in the business, those are not the only components you need to evaluate. Include intangibles like trust and the potential for a relationship with your whole family in your financial advisor search parameters.

By taking these factors into consideration, you will likely find not only a highly competent advisor, but also one who truly cares. ●

ABOUT US

BOB TABOR JOINED RICHARD P. SLAUGHTER ASSOCIATES IN 1998 AND SERVES AS VICE PRESIDENT. As a wealth advisor, member of the Slaughter Associates investment committee and leader of business development efforts, Bob combines his ability to understand the needs of clients and his broad industry knowledge to deliver the highest level of wealth management services.

Bob strongly believes in the wealth manager's role as a fiduciary, and has taken these principles to the development of Slaughter Associates' subsidiary, RPS Retirement Plan Advisors, which is an industry leader in providing advisory services to retirement plan sponsors and participants. ●



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