



**JEFF
SPENCER**

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What famous person would you like to meet and why?

Being the die-hard Michigan fan that I am, I would love the chance to meet Tom Brady. His success, work ethic, and passion for what he does is unparalleled in sports, in my opinion, and I appreciate that he has overcome many doubters, at various stages of his career, to get to where he is today. He fits the bill of being someone who does not have all the preconceived tools to be successful in what he does, yet has overcome those through mastering the mental aspect of his profession. In addition, while he is a very competitive individual, he also never lets his emotions get the best of him, which is important in this business. I feel I could learn a lot from chatting with someone like him.

When did you first become interested in working in finance?

I have been interested in our line of work ever since I was in high school. My father, whom I work with today, has been in this business for nearly 35 years, so I've been exposed to this profession my entire life. Thanks to my dad, I have been well versed in the characteristics, which I believe make one successful in this position: hard work, putting clients first, and having well-reasoned and strong convictions.

In 3 sentences, tell me about your role at the firm.

I am a Financial Advisor in the Traverse City, Michigan office. I work with clients all over the country, helping them to meet their individual financial goals – whether that is Retirement Planning, Income Generation during retirement, Saving for College, or Investing for various specialty needs, among other things. Our approach is fundamental in nature and slanted towards long-term outcomes in most cases.

What do you like to do in your spare time?

I really enjoy spending time with my family, my wife, Judy and my two sons, Brayden (4 years old) and Cason (2 years old). Whether it's spending time on the lake here in the summer, or visiting my wife's family in Northern California, we like to be outside when it's not below freezing! In addition, I am a huge sports fan, particularly of my alma matter, the University of Michigan.

What is one thing that most people would be surprised to learn about you?

I come from a pretty strong bloodline of athletes in my family. My wife was a top soccer recruit out of San Jose, CA and was first team all-Big Ten at the University of Michigan. My uncle played professional basketball for the Washington Bullets back in the 1970's. My younger sisters played basketball for UC-Santa Barbara and volleyball for George Mason University, respectively. My dad played Football for Hope College in Michigan. We're a pretty tall family, but I'm hoping my two sons are blessed with the athleticism of my immediate family!

If you could visit any place in the world, where would it be and why?

It would definitely be Bora Bora. It is the epitome of a "Tropical Vacation" with the water bungalows over the clearest water I've ever seen in a photo. With Traverse City having snowfall around six months out of the year, we are generally drooling over pictures of places like Bora Bora by the time March rolls around!