RFG ADVISORY

RFG Advisor Spotlight

"I wish I would have done it 20 years ago"

Mark Green has been in the financial services industry since 1985, when he began working at Merrill Lynch. After a decade in operations, he shifted to the advisory side, drawn by the social nature of the business. "I wanted to be around people I enjoyed being around—and it's a bonus that you get to help them with the stages in their life," says Mark. "That's how I kind of fell into the financial services business, and I've never looked back."

Mark was working at a bank wirehouse in 2018 when he first considered going independent. "Shannon Spotswood at RFG Advisory called, and from the very first conversation with Shannon, it felt like I was talking to an old friend," he says.

That phone call sparked the creation of GFG Wealth Advisors in 2019. "We're coming up on our fifth year in partnership with RFG," says Mark. In those five years, Mark has grown GFG's assets under management from $38M to $90M. "It's been wonderful," he says. "I wish I would have done it 20 years ago."

The Right Culture

As an independent advisor backed by RFG, Mark appreciates his autonomy. "There's nothing like the independence," he says. "Running my own business the way I want to run it and having the culture I want to have."

Mark notes that RFG's culture was the most significant change from his previous firms. "When you work for a major firm, you're a social security number and not a person with a name," he says. "If your culture matches their culture, you're golden. But if it doesn't, it can be very difficult." Those cultural discrepancies were the very reason Mark took his initial call with RFG, and they're an integral part of why he's so fulfilled in his current position.

Support Built for Scale

The RFG team made Mark's transition as easy as possible. "The transition team was second to none," Mark says. "From day one, the transition team at RFG really stepped in and made things extremely easy for us."

Mark Green
GFG Wealth Advisors

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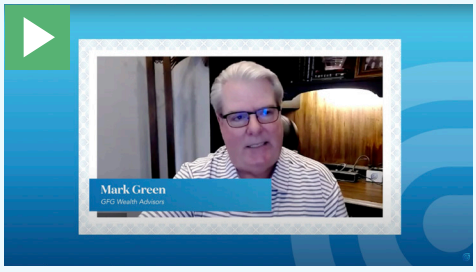
Listen to Mark talk about his growth since joining RFG.



The work RFG does to simplify processes and alleviate burdens on advisors like Mark extends beyond administrative tasks. In 2019, Mark decided to leverage Bluemonte, RFG's in-house investment platform. He was initially hesitant to use the platform.

After several months of reviewing Bluemonte's portfolio construction, learning about their disciplined approach and taking in Rick Wedell's routine Market Commentary, Mark became comfortable with their money management tact. "Their methodology was straightforward, easy to explain to clients, and I had gained confidence in their management style," Mark says. "Due to RFG's size, management experience, and utilization of technology, I found that utilizing Bluemonte was more efficient than managing portfolios on my own." He began transitioning his accounts over to Bluemonte and quickly realized the benefit of outsourcing investment management.

"It has given me the opportunity to go and do the things that I really enjoy doing," Mark says. "That's being with my clients, meeting new people, being out and networking." That newfound bandwidth allows Mark to be more available to his clients, and it also better positions him to scale his business by bringing on new business. "Because I made that adjustment, I think 100%, without a doubt, that's the reason my business has gone from $38M to $90M in five years," he says.

The adjustment has benefited Mark's clients, too. Routine market communications from the Bluemonte team keep them informed, and Mark has more time to delve into specific questions, assess life changes they are confronting and spend more time deepening their planning strategies. "There haven't been unexpected surprises because portfolios follow the benchmarks they are constructed against," he says. "I tell my clients all the time that the markets are going to go up and down, so steady progress toward a well-planned goal and addressing things you can control is key."

Planning a Legacy

After nearly forty years in the industry, Mark is beginning to think about transition planning for his firm—and RFG has been fully helpful and supportive. "They ask me all the time: how can we help you? What are you looking for? What do you need?" Mark says. "They're always asking and looking to help me build my plan." Mark appreciates that RFG doesn't have rules or limits around retirement, as he plans to remain involved in his business even as he prepares a younger generation to take the reins in the coming years. "It's an open architecture with RFG," he says. They ask, "what do you want as the advisor, and what can we do to help you? That's the way it is across the board entirely."

The technology stack RFG offers has enabled Mark to attract younger talent to his team, and it's allowed Mark to offer real-time analysis and insights to his clients in any setting. This combination of qualities—technology, support, autonomy, and culture—have cemented Mark's bond with RFG. "I can't scream it loud enough from the mountaintops," he says when asked if he would recommend RFG to other financial advisors. "Absolutely."

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>
> — ***Mark Green***
> GFG Wealth Advisors

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