'Great' Isn't Good Enough

Jones Financial Group of Wells Fargo Advisors

Spend a few minutes talking with Mitch Jones about his financial practice, and you're bound to hear words like "standards," "peak performance" and "unwavering commitment to service."

"Our goal," says the Managing Director – Investment Officer of the Jones Financial Group of Wells Fargo Advisors, "is to be the best at anything and everything we do."

This commitment is the driving force behind everything that happens at the Jones Group, "from how we serve our clients to how we manage their portfolios to the people we may refer them to," Jones says. "In my experience, if you're willing to be just a little more diligent, if you're willing to work just a little harder or make just one more phone call, we believe the results can be extraordinary."

Planning: Clarity Is Powerful

The first step is planning. "If you wanted to go to San Diego, you wouldn't just get in your car and drive," Jones says. "First you'd consult a map. Yet it's amazing how many people don't have that kind of clarity when they're getting ready to retire or make any kind of major financial decision. So the first part of working with someone is to create clarity."

"For example, how much money do they need each year to replace their lifestyle? Most people don't know what this number is, and we take as much time as needed to help them figure it out. What are their true needs, their true desires? It's amazing what this kind of clarity does for people. It's powerful."

From left: Montgomery Brewer, Fran Watson, Mitch Jones, Connie Pritchard

Strategy: Only the Best Expertise Will Do

Of course, Jones points out, even the perfect road map is of no use unless the vehicle is capable of making the trip. So once clarity has been achieved, the next step is to create an investment strategy to accomplish the financial objectives identified during the planning process. An investment policy statement that clearly states risk and return objectives is developed for each client. Jones and his team look for portfolio managers who perform at a very high level against their peers and consult "uniquely talented experts" – both within and outside the firm.

The final step is implementation. "We perform a significant amount of analysis to determine which investments, investment managers and investment strategies have an overwhelming degree of likelihood to meet this client's objectives," Jones says.

Jones is a seasoned wealth manager with experience in all types of markets and interest rate environments. He possesses a specialized level of financial knowledge. But his understanding of human nature and the insights he has gained over the course of his 20-year career have been just as pivotal to the success of his practice. He knows, for example, an educated investor who understands why a particular course of action or investment is recommended is more likely to be successful. He knows people are more likely to make mistakes when they're scared, and he knows how to calm his clients' fears.

Jones has also found it's difficult to motivate people to do things they're not passionate about, and he sees it as part of his job to help clients discover and work toward their passions. "Part of being successful financially is having the right reasons to be successful," he says.

"At Jones Financial Group, we'll help you find those reasons."

JONES FINANCIAL GROUP
of Wells Fargo Advisors

1710 East Arlington Blvd., Suite A | Greenville, NC 27858 | 252-493-4123 | mitch.jones@wfadvisors.com
jonesfinancialgrp.com