

Hamsher Wealth Management, LLC

Where You're a Name, not a Number

Spending time one-on-one discussing business and economics with Warren Buffet gave Troy Hamsher a key insight into caring for clients.

“All he did was ask questions...then he did all the listening,” recalls Troy. “I learned it’s not about the product. It’s about the consumer and what they want and what they don’t want.”

That lesson helped fiduciary financial advisor Troy and his wife Lauri, founders of Hamsher Wealth Management, LLC, build a successful firm that caters to their clients’ unique needs. Despite 2020 being a challenging year, they saw their largest growth in new clients, fueled mostly by referrals.

“When you’re a regular at Starbucks, your barista knows you by name, but it’s shocking to me that people trust their financial future to someone who knows them as an account number,” says Lauri, who leads the firm’s client services and support operations. “We are not that. We know our clients by face and name, not just a number.”

“There’s a saying, ‘People don’t care how much you know until they know how much you care.’ We care about each client,” says Troy. “Financial planning is not a one size fits all nor should it be. We get to know your income needs, timeline, health concerns, goals, etc. and work with our team of 50-plus professionals to customize



Lauri & Troy Hamsher

a plan for you and your family that’s as unique as your fingerprint.”

Hamsher Wealth Management’s one-stop team works in tandem, creating coordinated, customized client plans that include investment management, tax strategy, insurance solutions, and legacy plans. Their holistic approach minimizes the risk that can occur with a la carte financial planning and serves both baby boomers and couples in their 50s particularly well.

“Ten thousand people retire or turn 65 every day in this country,” says Troy. “They’re facing the retirement decision-making process and asking if they can retire before 65 and carry the burden of

insurance costs while caring for their parents and children. These are the people with the immediate needs.”

“My dad used to tell me that people don’t save money until their 50s,” says Lauri. “This age group has put their kids through school, and now can start preparing for wealth and retirement. We want to be that firm that helps an individual or family become high-net worth.”

As a married couple advising other married couples, Troy and Lauri know it’s important that both parties understand and agree on their financial plan.

“We make sure people know what they are getting and why,” says Lauri. “Nobody walks away without understanding how each investment vehicle works in their blueprint. Our clients can explain to their neighbors the purpose their investments serve.”

Educating their clients on different investment types is vitally important to the Hamshers. While COVID-19 has put their public educational programs on hold, they’ve made their book *Who’s Retirement is it Anyway* available for free to anyone who requests one.

“Anybody would rather play a round of golf than search for a financial professional but finding the right one now will set you up for many more rounds of golf in the future,” says Lauri.



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