THE BUSINESS JOURNAL
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VINCENT J WHELAN

CFP® PRESIDENT

WHELAN FINANCIAL

EDUCATION: College of the Holy Cross, Worcester, Massachusetts

AGE: 68

FAMILY: Son: Taylor Whelan, CFP® is our Chief Ethics and Compliance Officer; and Daughter: Riana Whelan, FPQP™ is our Marketing Assistant and Community Relations.

WHAT WE DO: We provide wealth management that approaches investing from a financial planning perspective. We understand our client's whole financial picture and invest accordingly.

How does the family dynamic play into Whelan Financial's business model?

Everything we do at Whelan Financial is in the best interest of our clients. The "family dynamic" doesn't change the focus of the business but rather helps drive it forward.

Riana, in her capacity of Marketing Assistant, helps deliver this message to those who are being introduced to us as prospective clients. Taylor, in his capacity as Investment Advisor, ensures that the highest level of care is delivered to each of his clients. We have an incredible team at Whelan Financial and I consider each member of the team family. We genuinely care about our clients and believe in our mission of care delivered by highly skilled professionals.

What does Whelan Financial bring to the table that other financial companies don't?

This company was founded on a single principle: "To provide the service and quality of advice that I would seek from an advisor." We understand our clients, their needs, and make recommendations that are specifically tailored to their circumstances.

While we have multiple advisors at Whelan Financial, we work as a team. Each client recommendation is approved by an appropriate committee to ensure quality and consistency of advice dispensed throughout the firm.

We also meet with our clients quarterly. This cadence allows us to get out in front of any market-based concerns or planning opportunities.

Finally, we consult with other professionals, like estate planning attorneys and accountants, so that the client has a wholistic financial plan supported recommendations geared toward their goals.

What are some of the misconceptions you encounter about financial planning?

Honestly, there are just too many misconceptions to list! Misconceptions typically fall under two broad categories: 1) preconceived notions of what one should do with their wealth; 2) information that is either dated or not applicable.

What are the plans for Whelan Financial in the future?

Since day one, I have had big visions for this firm. It's incredible to see how we've grown over the past 30 years. We've gone from a solo advisory firm to a business with multiple advisors and clients throughout the country.

As we continue to grow, our core company values remain the same. Each client at Whelan Financial will receive our very best care and attention.

What is the most rewarding part of what you do?

We get to impact the lives of our clients and change them for the better. This is incredibly fulfilling for those who strive to help others. I consider this the true compensation for what we do at Whelan Financial.

People are surprised when they learn that most of our advisors chose to major in the humanities. The traditional finance or accounting degree did not precede our real world job in finance. However, the analytical tools of finance can be learned. In fact, each advisor at Whelan Financial is required to become a Certified Financial Planner.

What cannot be learned is the ability to innately care for others. We seek people who have this passion in their core and draw from it to benefit the lives of our clients. In turn, we experience immense fulfilment as advisors and as individuals.

What are your roots in the Central Valley?

I moved here at the age of 29 from Worcester, Massachusetts, as a consultant for a Valley medical practice. I was supposed to be here for two weeks and have now been here for 37 years.

What do you like to do in your spare time?

Golf, work with personal trainer, spend time with friends.