

SOUND ADVICE FOR A SOUND FUTURE

Financial Planner + Coach = Success



“I help people get into their first home. I help them educate their children, and I help them retire with dignity.” This is the way Robert Walsh said his so-called “elevator speech” goes. “And the next question is always, ‘How do you do that?’ Then I tell them I am a financial planner/coach.”

As the CEO of Bridgeport, CT-based Sound Coaching Inc., Walsh combines the crucial role of financial planner with that of great coach. “Our goal is to help small businesses and individuals recognize, facilitate and achieve their financial goals. We also help them work, play – and truly live on a higher sustainable level,” Walsh shared.

He explained that most successful businesses work with a lawyer, insurance agent, broker and accountant. But often these professionals don’t know each other nor do they mesh. Hence, they rarely work together as a team. In fact, they often

wind up competing instead of complementing each other and the end results of that are conflicting goals and incompatible strategies. Sound Coaching brings a connected approach to a company’s or an individual’s financial situation and coaches them every step of the way.

“Our clients are the people big investment houses don’t find ‘big’ enough to work with. We don’t judge a client based on how much or little money they have. The first thing I ask them is where they want to be three years from now and we go from there. We find out who they are, what their goals are and we devise an achievable ‘a la cart’ plan for every single

one. This methodology develops an ideal holistic financial plan that mirrors short and long term needs,” Walsh detailed.

As a former proprietary bond dealer who has lived and worked around the globe, Walsh found his true calling when he created Sound Coaching Inc. “I was a good bond trader. But when I made money, someone else lost it. Now, I take great pride in telling others that I help people for a living.”

Walsh has found that there are four telling commonalities among clients. These are cash flow crunches, time management problems, relationship issues with others and relationship issues with themselves. Addressing and dealing with those fundamental issues are the tenets around which the company bases its coaching and financial planning and is a truly different approach.

Walsh and company, when wearing the hats of trusted financial advisers, guide clients in managing portfolios, navigating taxes, reviewing income flow and all the nuts and bolts aspects of their ever-changing financial needs. As coaches, however, they are often in the position of needing to tell clients things they really don’t want to hear. “That’s the thing about what we do. Clients can take or leave advice from a financial planner, but when it comes from a coach, they are very apt to take it. That separates us from others. We are honest, credible and consistent. That’s how you lead people,” said a passionate Walsh, sounding very much like a football coach – a winning coach. ■

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