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A MAN IS NOT A (FINANCIAL)

PLAN

A woman with long dark hair, wearing a red top and a pearl necklace, is sitting at a desk. She is holding a pen and writing on a document. There is a white mug on the desk to her left. In the background, there is a large window showing a city view.

KATHLEEN LONGO, ADVANTAGE AUTHOR

How a Female Finance Pioneer is Reshaping Women's Experiences with Wealth

By Roya Rodieck

When 18-year-old Kathleen Longo got to Purdue in 1988, her academic ambition was guided by a fierce love of numbers. She majored in economics at the outset of her collegiate career. The field offered the interplay of numbers and 'real world impact' that she sought, making it the best fit for her aptitudes and interests—or so she thought.

In a serendipitous moment, a classmate at Purdue suggested she take a financial planning course, meant to introduce students to the financial planning and counseling major at large. She found herself besotted with the curriculum, and a realization swiftly materialized. "I thought, 'I love everything about this, I can't believe this could be a profession...financial planning tackled larger issues, like how to plan for your children's education, what happens when you die, the consequences when you don't make plans for your assets.'" The numerical aspect was imbued with the meaning

by a nuanced understanding of her clients' personal needs. This put her in a prime position to found her own firm, Flourish Wealth Management. She envisioned Flourish as "a nimble firm" that would adapt to the client's every need and direct them through tough transitional moments. "I wanted to tune in to the pulse of each client," she says.

Having dutifully followed both her ambitions and heart, Kathy can only rave about the decision to become her own boss. She welcomes the challenges it brings with open arms. "Just the other day my husband looked at me, smiled, and said 'I know you're busier than ever, but I've also never seen you happier.'"

Despite the relative youth of the company, it is already piling on accolades and recognition at the local and national level. For three years running, Flourish has been ranked in the Top Ten Advisory Firms in the state of Minnesota.

decisions, a man is not a plan. This created an opportunity for me to build a bridge to female clients, helping them gain a deeper understanding of the financial concepts that matter, while also building a personal connection between women and their wealth."

Even within her own industry, Kathy notes that "only 26% of the financial services industry is female, and even fewer firms are owned by women." This positions her as an unexpected leader in a burgeoning movement to provide women with a louder voice in the financial sphere.

Moving forward in her career, Kathy had a newfound goal: to circulate the shrewd insights she'd gained over a 20-year career. As a book publisher, Advantage|ForbesBooks is in the business of lending a voice to business professionals, providing them with the tools needed to impart their stories, passion, and knowledge on a wider audience. When Kathy crossed paths with the company,

"Just the other day my husband looked at me, smiled, and said 'I know you're busier than ever, but I've also never seen you happier.'"

and purpose she sought, outshining the purely commercial impact of economics. Kathy promptly switched her major to financial planning. "I could help people. I was hooked."

In addition to classes for the major, she astutely enrolled in psychology and communication courses as well. The aim was to acquaint herself with the distinctly human aspects of the profession—the psychology of decision-making, the emotional motivations that steer these decisions. This would allow her to have a full-bodied financial planning practice someday.

Upon graduation in 1992, Kathy met her employer and mentor, Carol Pankros—founder of one of the few female-led wealth management firms in the country at the time. By 2014, Kathy was a seasoned industry expert with a wealth of experience, set apart

A distinctive feature of Kathy's practice: she offers wealth management uniquely for women. When asked how she arrived at the decision to provide female-tailored services, Kathy explains, "In some circles, there is a lingering feeling that women take a backseat [in the realm of] finance, letting their spouses [take the financial reins]. This couldn't be further from the truth. Women's wealth and [their ability to acquire it] is growing faster than it ever has. At present, women control \$14 trillion of personal wealth, or 51% of the total... I have [also] felt that women are an undeserved part of our industry. [They] tell me that their prior meetings with a financial planner made them feel like they didn't have a voice... While some are comfortable relying on their husbands to make financial

her goals and their mission struck a perfect match. "The opportunity to share this information with a broader audience was an important part of my decision to partner with Advantage|ForbesBooks." Kathy launched her Membership with Advantage|ForbesBooks and began the collaborative process to create her book. Entitled *Flourish Financially—Values, Transitions, and Big Conversations*, the book was nothing if not a passion project for Kathy, "cultivated by the expert advice [she] received from Advantage|ForbesBooks." It is due to hit bookstore shelves in June. 📖



MORE THAN SKIN DEEP

Plastic Surgery With Conscience and Heart

By Roya Rodieck

With senior year drawing to a close, Dennis Schimpf was scrambling. His college mandated he complete a certain number of volunteer hours, and he had yet to start. In a pinch, he had under two months to squeeze in an absurd amount of work.

“You’ll need somewhere that stays open 24 hours,” his counselor quipped.

And this is how a sports scholarship recipient came to spend nearly all of his free time in the emergency room. It was nothing short of a plot twist when he fell in love with medicine. The attraction proved so powerful that it quickly derailed pre-existing ambitions like student administration, law school, and coaching. Dennis promptly enrolled in a post-bachelor’s program

to complete the prerequisites for medical school.

After a five-year residency in general surgery, Dennis—now Dr. Schimpf—had been exposed to a host of different surgery types—cardiac, trauma, neuro. Ultimately, he found himself drawn to the breadth and scope of plastic surgery. “It was one of the few disciplines where you can operate on the whole human body—from head to toe—doing facial trauma, cleft/open

palate, cancer reconstruction, breast reconstruction, right on into cosmetic surgery.”

Despite his passion for it, surgery did not entirely eclipse Dennis’ other aspirations and interests. Amid an illustrious career as a surgeon, he returned to school to pursue an MBA. Armed with newfound business acumen to supplement his surgical skill, he began his own private practice, Sweetgrass Plastic Surgery, in the low country of South Carolina. Finding himself in the “mecca of microsurgical breast reconstruction” that is Charleston, Dr. Schimpf spent many years honing his skill in reconstructive medicine. His particular compassion for cancer patients stems, in part, from his own mother having battled a brain tumor.

Since its inception, Sweetgrass has served countless patients. In that time, Dr. Schimpf has unwittingly learned a great deal about human psychology—not only that of his patients, but their spouses and family members too. He’s handily dealt with the challenges and issues that accompany his line of work: combative spouses, a hostile perception of plastic surgery, patients with outlandish expectations as they go under the knife. Spouses and family members, he learned, tend to exhibit a sort of ‘good-intentioned hostility’ toward a loved one’s desire to get work done.

“They’re perfect the way they are.”

“They don’t need this.”

“I don’t understand why they even want it.”

Despite the aura of good intention, there is a blatant disregard for the emotional and psychological wellbeing of their loved one. If a woman feels the sting of low self-confidence when she puts on a dress, it is no one’s place to tell her she can’t take measures to mend her self-image. Ultimately, the family member’s feelings are not to be the center of focus, for either the patient or Dr. Schimpf. He specifically seeks patients who are looking to

do something for themselves, not to appease others.

With a chuckle, Dr. Schimpf notes that men often think that when a wife or girlfriend seeks cosmetic surgery, they are doing it “for” them. They fail to realize that her desire for the procedure usually predates her involvement with him. Ultimately, it is about no one but her—her bold reclamation of body confidence, her comfort, her psychological wellbeing, her will, and her agency.

Still, not every potential patient



Dr. Dennis Schimpf, Advantage Author

comes to him with healthy and realistic expectations. There is a ‘screening process’ of sorts that patients undergo, and selectivity is critical. Those who come to the center are considered for cosmetic surgery, not automatically granted it. “If I ask what’s bothering them, and they say ‘Everything,’ that’s a bad answer,” he says with a laugh. Plastic surgery is not a cure-all to self-loathing, nor is it terrain for the hyper-self-critical. If a person has healthy reasoning, a definable problem, a procedure to ameliorate it, and a high probability for success, Dr. Schimpf feels comfortable moving forward with surgery.

In many ways, his practice sheds light on the less-discussed implications of motherhood, both physical and psychological. Women are sometimes reticent to discuss how childbirth may have impacted their body confidence

and sexuality, or how they often shelve many of their own needs, priorities, and pursuits after giving birth. For this reason, the decision to pursue plastic surgery serves as an empowering reclamation of female agency and body confidence. Dr. Schimpf has encountered many women who tell him, “I really shouldn’t be here. I feel guilty. I shouldn’t focus on myself, because I have children to focus on.” But as Dr. Schimpf points out, there is an entirely selfless element to this decision as well. If a long-sought cosmetic procedure nurtures her confidence, happiness, and emotional wellbeing, she is creating an environment conducive to being the best mother she can be. Motherhood is, indisputably, a beautiful and gratifying experience. Dr. Schimpf’s procedures allow a woman’s external beauty to match that of the experience.

Communication and collaboration are critical to the process. Dr. Schimpf and his patient will engage in a healthy dialogue—about their respective hopes, doubts, and expectations for the procedure. In effect, he has become a partner, consultant, and guide to countless women on their journeys to body confidence and emotional health. All because he fell a little short on volunteer hours. 🌱

“Plastic surgery is an empowering reclamation of agency and body confidence.”