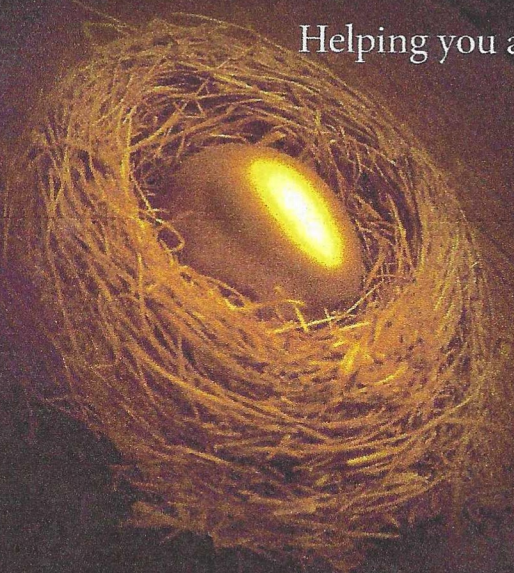


## Helping you achieve your Financial Goals



- Organize your finances
- Accumulate wealth
- Preserve more of your wealth
- Retire in comfort earlier
- Enjoy the lifestyle you desire
- The right college for your children
- Pay less in estate taxes
- Distribute more assets to heirs
- Donate more to charity



Emerald Wealth Advisors is an Investment Advisor registered with the State of Connecticut.

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## Keep Clients from Panicking

If you can educate clients to a point where they don't panic whenever the markets fluctuate, then you – as an advisor – have been successful.

**T**hat's the goal David J. Boczar, CFP®, CFA, a private wealth advisor for Emerald Wealth Advisors in Westport, Conn., has for each individual relationship with his clients.

"We spend a lot of time at every meeting educating clients as to what is normal in the markets, reassuring them that volatility is normal," Boczar said. "But one of the greatest levels of satisfaction I have is that it is rare for my clients to panic. If you can keep your clients educated and informed – this is the best way to get through."

The majority of clients come to him through referrals. Although his engagement minimum of \$250,000 is enforced, it isn't the most important factor for Boczar in establishing a new client relationship. He seeks

clients with a desire to rely on the expertise he has gained in the 35 years he's been in the financial services business. The first 20 of those years were on Wall Street – a



sector of the industry with which he maintains close connections, even though his work is now more closely aligned with the fiduciary standard. Boczar holds both the

Certified Financial Planner (CFP) and Chartered Financial Analyst (CFA) certifications.

"A lot of people are very bright and focused and knowledgeable about finance, and they do their jobs very well, but due to time constraints, they just do not have the full expertise for looking at all the facts, nor do they necessarily have the time or interest," Boczar said. "People appreciate that they can look at my background and my credentials, and they feel comfortable with me. My clients feel they can look to me for guidance."

Learn more about David J. Boczar, CFP®, CFA and Emerald Wealth Advisors online at [www.emeraldwealthadvisors.com](http://www.emeraldwealthadvisors.com)