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"Investing Coach"

Brendan Magee empowers families to reclaim their American Dream. page 16

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Empowering Families

“Investing Coach” Brendan Magee
empowers families to reclaim their American Dream.

Brendan Magee believes there’s a big difference between a financial advisor telling an investor what to do with their money and an investor coach helping people discover how markets work and having 100 percent clarity about what should and should never be done with their money. He sees *discovering* as the foundation in

transforming people’s experience of investing. “Investing without understanding how markets work is like trying to ride a bicycle without discovering balance,” he says. “Without it, it’s going to be a very painful and frustrating experience. However, once you get balance, that bike gives you freedom, independence, adventure, and all kinds of

wonderful possibilities that come to life for people. The difference between telling and discovering for themselves is that the person who discovers now owns it. It’s now part of their DNA. That is when people experience freedom, power, and joy around money and investing. They are free to create for themselves the future they want to live.”

As the founder of Inevitable Wealth Coaching, Magee has made it his mission to help investors eliminate speculation and gambling from their portfolios. Furthermore, he wants to help investors identify and avoid the risks associated with what he calls “traditional” financial planning.

“I want to take them to a position where they have a full belief in what they’re doing,” he adds. “A financial advisor will tell you what they think you should do with your money, and as an investor you are left to hope and pray that what they are telling you is really the truth. In helping you discover scientifically how the world of investing really works, an investor coach can help you clearly and confidently choose how your money should be managed, plus have clarity about who should and shouldn’t be managing your money. Most importantly, a coach can help you identify and alter destructive behavior grounded in blind spots and bias.”

As an “Investing Coach,” Magee helps people learn to ask the right questions about how their money will be invested. With that expert guidance, he says, the investor should be able to identify the aforementioned blind spots.

“The quality of anything is based upon the quality of questions you’re asking,” he adds, “and it’s the questions you hadn’t thought to ask that come back to haunt you.”

Magee knows from what he speaks. After graduating from Temple University, he began his career as a financial planner. The repeated experience of watching as conventional investment strategies failed to best serve clients moved him to question the approach.

“After five years, in my mind, something was not working for me or my clients,” Magee recalls. “I wondered what the disconnect was. I was confused and frustrated that fund managers who by their track records had produced outstanding returns, routinely, delivered disappointing returns after we invested in them. I was asking for explanations from people I thought should have the answers, but didn’t. As a financial planner, I was scared because I had people’s life savings in my hands. If I lost their savings, and they looked to me for answers as to why that happened or how to fix it, I knew I didn’t have the answers and I had no confidence the investment industry had

any either. I was scared and had two choices: Get out of the business completely; or find a better way to do this.”

The answers to his prayer came 27 years ago, when he attended a presentation about investing by prominent economists, including several winners of the Nobel Prize—namely, Eugene Fama, Harry M. Markowitz, Myron Scholes, Rex Sinquefeld, and William F. Sharpe. Through them he came to understand why his prior approach was fatally flawed. He saw it as completely

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—BRENDAN MAGEE,
INEVITABLE WEALTH COACHING



For more information from
Inevitable Wealth Coaching,
call (610) 299-3969 or
visit CoachGee.com.

out of integrity with itself and destroying people’s lives in the process.

“I could never go back to the way the industry wanted me to,” he says. “People deserved way better than to be deceived about their life’s savings and hard work.”

The economists’ instruction helped him see that financial markets operate very differently from the ways portrayed by the media and the investment industry itself. His conclusion: The myths of investing benefited the profits of the investment industry rather than investors’ financial security.

“Once I learned how the markets worked, I had the freedom, empowerment, and joy that comes with that knowledge,” Magee says. “My passion became helping to create that for others. I was free to pursue my life’s purpose, which is creating

love and generosity in the world. The investment industry is selling people down the river. The investment industry is facilitating destructive behavior.”

Empowering Investors

Magee says the first questions he asks clients are, “What’s your true purpose for money?” and “Do you understand how the markets work?” Most people aren’t used to being asked these questions by their advisor, so they often give blank stares and stumbling responses. Magee says that’s OK because it leads them down a path to discovering and fulfilling their life’s true purpose.

“Without knowing how the markets work, the default future the majority of people fall into is handing over their life savings to people they’ve never met, being kept in the dark about what’s being done with their money, with no opportunity to say if they agree or disagree with how their money is being managed, and falling victim to a story, be it one they are told or one they are telling themselves,” he says. “This process leaves them making decisions and engaging in behavior that is in complete conflict with themselves and their American Dream. Most people have no idea of just how disastrous the results have been for investors.”

Magee also believes investors need to create a purpose greater than money. He notes that this philosophy has proven successful throughout history.

“Our country was founded on the Declaration of Independence,” Magee says. “Martin

Luther King Jr. was committed to freedom and equality. Mother Teresa was committed to compassion. Their lives were used for fulfilling on their life’s purpose. Money wasn’t the driving force in their lives.”

He believes he can help people make substantive changes that connect an individual’s desire to make money and live comfortably, with the desire to create something far more fulfilling. They just have to take the time to create it or discover it for themselves.

“I live to enroll people into a vision that’s much more powerful than money,” he says. “Money or a life without purpose is not very satisfying. Coaching, at its core, is helping people to achieve their American Dream so they can help others achieve their American Dream.” ■