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George McReynolds
delivers simple and proven
solutions to help people
make "great decisions"
regarding life and wealth.

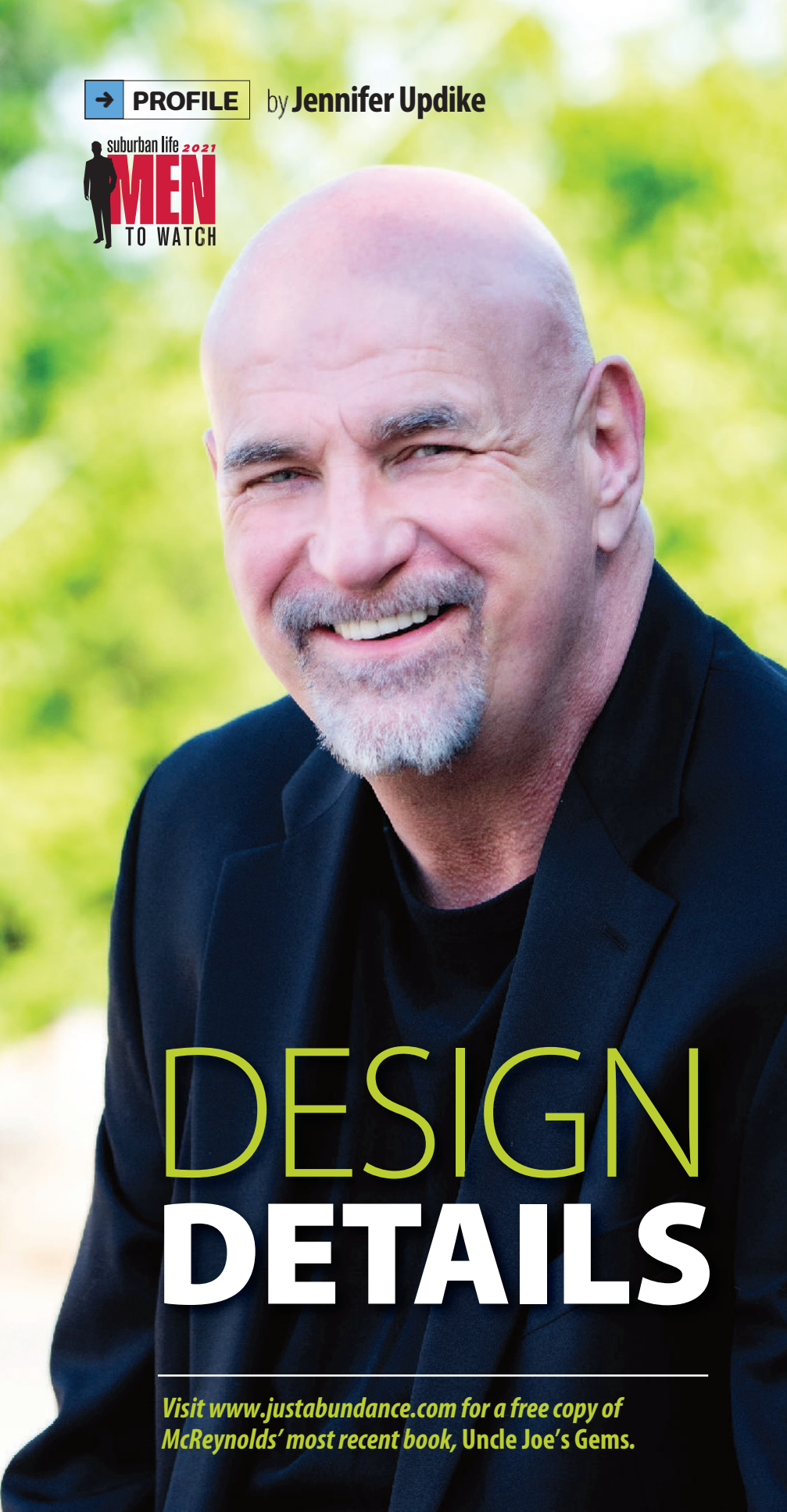
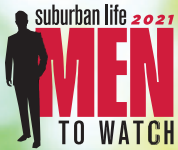
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PROFILE

by Jennifer Updike



DESIGN DETAILS

Visit www.justabundance.com for a free copy of McReynolds' most recent book, *Uncle Joe's Gems*.

George McReynolds delivers simple and proven solutions to help people make “great decisions” regarding life and wealth.

Mindset means everything, according to George McReynolds, CFP®, RFC®. This truism applies to almost everything in life, but especially in regard to achieving personal goals and building a prosperous financial future.

“It is my belief that great decisions are 80 percent psychology and only 20 percent strategy or mechanics,” he says. “When it comes to how people plan for their future, most people focus on the details rather than how they view the world. In my mind, that’s backwards.”

McReynolds is a CERTIFIED FINANCIAL PLANNER® professional, Certified Financial Fiduciary®, wealth manager, tax professional, and expert in life coaching and time management, as well as a decorated veteran of the U.S. Army and a prolific author. For 35 years, he has been helping clients hone the mindset needed to build an unshakable foundation for a successful financial future.

“When values are clear, decisions are easy,” says McReynolds, borrowing a quote from the late Walt Disney Co. executive, Roy E. Disney, whose father, Roy Sr., and uncle, Walt, founded the company. Clear-eyed values are integral to McReynolds’ 2001 book, *Prosperity By Design: How to Make Great Financial Decisions*, which includes interactive exercises designed to help people understand with crystal clarity the values that guide their lives.

McReynolds had a similar idea in mind when he penned his most recent book, *Uncle Joe’s Gems: Small But Valuable Thoughts on Life and Wealth*. He welcomes readers to visit the website www.justabundance.com, and receive a complimentary copy of *Uncle Joe’s Gems*.

“My Uncle Joe was a popular chapter in my first book,” he says. “*Uncle Joe’s Gems* has many quotes from my Uncle Joe, among other people, about the nature of true wealth. ‘Direction is more important than speed,’ is one example, because people are often running in the wrong direction, quickly. The whole

Cover and lead photograph by Jody Robinson; others courtesy of George McReynolds



A sought-after speaker, McReynolds recently shared the stage with Nigel Farage, a former leader of the Brexit movement, and discussed the origins and impact of COVID-19 at the London Stock Exchange. He also spoke to an audience at Oxford University about goal setting and visualization.

point is that there are simple, proven things you can do to put you on a clear path to successful outcomes. For each quote there's a journal exercise, so over the course of 90 days, the book will help people form a positive attitude and belief about life and wealth."

Today, McReynolds leads three veteran-owned companies: Protective Wealthcare, Personal Tax Service LLC, and Just Abundance Media LLC. He also ranks among the industry's most sought-after experts on wealth, personal development, and related topics, both at home and abroad. This year, for example, his travels included a speaking tour of the U.K., where he outlined the topic of his forthcoming book, *Borrowed Time: Demographics and the Coming Financial Storm*. He had the opportunity to share the stage with Nigel Farage, a former leader of the Brexit movement and prior member of the European Parliament, and discussed the origins and impact of COVID-19 at the London Stock Exchange. He also spoke at Oxford University about goal setting and visualization, a process he has used to "level up" his life on several occasions.

With every speaking opportunity, McReynolds likes to use tangible, easy-to-understand concepts to explain far-reaching topics. At Churchill College at Cambridge University, for example, he described the life-changing revelation he experienced during a day "above the clouds" with a mountain climbing school in the German Alps; he used that experience to confront his fears and overcome obstacles. At The Royal Society of Medicine, he spoke about the all-too-common financial mistakes made by members of the medical community; he covered the same topic in the foreword and afterword he wrote for *9 Money Mistakes that Doctors Make* from

retired surgeon Vicki Rackner, M.D., FACS.

McReynolds sees himself as an educator first and foremost. Whether he's lecturing to a crowd or having a face-to-face meeting with a client, McReynolds strives to offer simple, straightforward solutions so people can make more informed decisions about the future.

When he brings on a new client, he starts by learning about a client's goals beyond dollars and cents, and then establishing a personal and strategic plan for financial success. While a typical Protective Wealthcare client has wealth in the \$1 million to \$5 million range, he recently unveiled a monthly subscription-based program for those who need financial advice beyond investing such as debt management or employer benefits.

He designed his simple-to-understand process—concept, design, details—to help clients make easy decisions for tax savings. Few people understand they could lose half of their retirement assets to taxes. He suggests many people start at the wrong place by trying to reduce taxes at tax prep time: getting the right numbers in the right box on the right forms by the right date. "It's basically financial history at that point," he says.

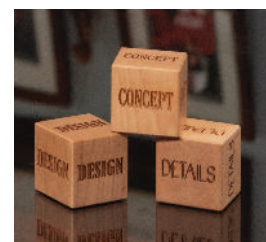
In addition to his comprehensive tax-planning services, he conducts a web Master Class called "Defuse the Bomb," which illustrates in detail how taxes change throughout different stages of retirement, which, in turn, can affect an individual's financial interests. His website www.defusethebomb.com offers a free guide to help pre-retirees make the "right" decisions now to accommodate a comfortable retirement later.

He takes a similar approach to investing to eliminate the chaos of the 24/7 news cycle. Too often, he says, people let the news of the day affect their long-term financial plans.



His process, outlined in a video at www.wealthcareplan.com, combines a number of "proven and proactive strategies" to balance a client's need for income and growth with the need for safety and stability. He does everything in his power to help clients not only achieve their goals for the future, but also make sure they enjoy the journey, before, during, and after retirement.

As McReynolds says, "Nothing happens suddenly when you're paying attention. Everything is a surprise when you're not." ■



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