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## Investor Coach Brendan Magee's Passion: Changing Lives and Saving Families Through Life-Altering Investing Breakthroughs

BY BILL DONAHUE | PHOTO BY JEFF ANDERSON

**T**alk to Brendan Magee, AIF, for more than a few minutes and he's likely to consistently utter a certain phrase: "your true purpose for money and life." He is on a mission to transform people's experience of investing and leave them with peace, freedom, fulfillment, and love through his work as an **Investor Coach**. As the founder of Inevitable Wealth Coaching and the author of two books, *The Investor's Bill of Rights* and *Portfolio Paradigm*, Magee helps people to discover "the science of investing," thereby empowering them to live in a world that is driven by and aligns with their purpose.

"The beautiful thing about purpose is that it's a never-ending mountain," he says. "If you know your purpose, you get to spend your life fulfilling on the one thing in life you value the most."

Apart from his work, Magee prioritizes faith and family. He and his beautiful wife, Jennifer, have two sons, Liam and Owen. At St. Anastasia's Parish in Newtown Square, he volunteers as a lector and spends time with people whose health no longer allows them to attend to church. He also devotes his time to notable causes through his involvement in the Newtown Square Rotary. In addition, Magee has gotten involved in local politics, having served as a committeeman for the Newtown Square Republican Party since 2023.

We spoke with Magee about his definition of investor coaching, the importance of mindset, and what he considers his greatest mission in life.

## Q&A

**You refer to yourself not as a financial planner but as an Investor Coach. Why is that distinction important?**

There are three questions just about every investor has been programmed to ask: "What stocks should I invest in? Should I be in the market or out? Which manager should I hire?" As a coach, I help people discover that those questions create nothing but frustration, despair, and anxiety. Coaching helps people ask empowering questions like, "How do markets actually work?" Discovering that answer alone takes all the power away from Wall Street and puts it in the investor's hands.

Coaching can and should be a life-altering process, because money is a thread that runs through every aspect of a person's life. Transforming a person's experience of investing and money starts with discovering their true purpose for money, then aligning everything you are doing in life and money with that purpose. That's when investors not only understand what they need to be doing with their money, but most importantly why the choice they've made is the absolute best way to manage their money. That's when they experience the life-altering "aha" moment that gives them true peace of mind.

## What's the biggest challenge that investors face in working with Inevitable Wealth Coaching?

The biggest blind spot investors have is not understanding how an investor's mind works. Most investors believe that their investing decisions come from rational and analytical thinking, and that just is not the case. The reality is that investing decisions come from an investor's instincts, emotions, blind spots, and biases, and this kind of thinking produces actions that are always in direct conflict with fulfilling on our true purpose for money.

For example, we all know that exercise and a healthy diet are good for us, but our instincts have us sitting on the couch and eating junk food because those actions are pleasurable. It's the same with investing. We know the rules, buy low/sell high, but our instincts and emotions have investors selling low and buying high on a consistent basis. The real challenge is helping people to discover and realize the brain isn't their friend when it comes to investing. Genetically, it's programmed for survival, not long-term investing success.

## What do you see as your ultimate mission?

Without a purpose a person will never have enough money, and with a purpose a person doesn't need a dime to live a fulfilling life. For me, my passion is helping people discover their purpose and then helping them spend a lifetime fulfilling on that purpose.

## How, when, and why did you formulate this approach?

It was around 1995 when I had my eyes opened. I had been in the business as a financial planner for about five years, and I was at a point where I was ready to leave the profession. I saw the blatant lies and intentional deceptions the investing industry told and is still telling investors to talk them into behaviors that destroyed peoples' American Dreams, while assuring the industry's profits. My breakthrough came when I discovered the science of investing from Nobel Prize-winning economists like Harry Markowitz, Eugene Fama, and Myron Scholes. They showed me that the world of investing works very differently from how Wall Street and Madison Ave. would lead us to believe it works. My passion became and has been ever since sharing this science with people, and helping them discover the difference it makes in terms of quality of life for them and their families. ■



For more information about  
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