

William Manchester, founder of
The Manchester Group of Firsttrust
Financial Resources, in alliance
with Equitable Advisors, LLC

'Where You Are Our Top Priority'

2023
MEN
OF THE YEAR
suburbanlife

The Manchester Group uses trust, accountability, and 24/7 availability to guide clients onto the path to realizing their financial goals.

BY **BILL DONAHUE**
PHOTOS BY **NINA LEA PHOTOGRAPHY**

William Manchester spends his days creating artfully crafted financial plans designed to help clients preserve, protect, and grow their wealth. Before he embarked on his career as a financial professional, however, he envisioned a much different trajectory for his life.

Two decades ago, Manchester was working in his chosen field of horticulture, with a dream of one day opening a flower shop. His plans changed when he crossed paths with a man named Andrew L. Lewis Jr., chairman and CEO of Union Pacific Corp., who also served the Reagan Administration as Secretary of Transportation.

"Drew and I became close, and he asked me about my plans for the future," Manchester recalls. "He told me that my flower-shop idea sounded great, but he also told me I should do that when I retire. He advised me to make some money first. He thought I would do well in financial services because I seemed to have a genuine interest in it. He saw things in me that even I didn't see."

Manchester followed Lewis's advice by earning a degree in finance and business administration from Temple University's Fox School of Business. Now, 25 years later, he leads The Manchester Group of Firsttrust Financial Resources (FFR), in alliance with Equitable Advisors, LLC.

Devoted to helping clients prepare for the future through wealth management, retirement planning, investment planning, and estate planning strategies, The Manchester Group works with clients from all walks of life: high-net-worth executives, business owners, nurses,

teachers, etc. No matter who the client is, Manchester and his team strive to help each client achieve their financial goals through trust, accountability, and 24/7 availability.

Manchester cites the firm's tag line: "The Manchester Group of Firsttrust Financial Resources, where *you* are our *top* priority."

"My wife and kids may not like it when I say this, but I love Mondays," he says. "I can't wait to go to work because I love what I do, so it never bothers me to answer a question or return a call, even if it's a weekend. A lot of people don't get the time to look at their portfolio or retirement plan until weekends or days off, so I tell them, 'If you have a question or a concern, don't wait until Monday. Give me a call anytime.'"

"I love the research and planning that goes into each client's plan," he continues. "I also love seeing the reward, when a client realizes the benefits of the things we put into action and says, 'Hey, it was worth going with Bill and The Manchester Group.'"

Not only do clients get him and his decades of experience, but they also have the capabilities of fellow financial professionals Gregory Mugnier and Cristian Surdykowski.

Mugnier has a background in accounting and financial planning. Prior to joining The Manchester Group, he honed his knowledge with a Philadelphia-based tax firm that used innovative strategies to sustain and build clients' wealth.

Surdykowski describes The Manchester Group's ideal client as an individual, family, or organization that wants to "take a proactive approach to ensuring financial stability and growth across all life events and obstacles that are thrown at them."

"What I enjoy most about my work is helping alleviate our clients' financial burdens while working with a team that genuinely cares about the financial and overall wellbeing of all our clients," he adds. "We understand all situations are unique, whether it concerns retirement planning, asset allocation, cash management, insurance needs, college planning, estate and tax planning strategies, or fixed-income investments. With a team that has diversified knowledge and resources available, we feel like we can effectively help everyone in need of guidance or advice."

Cristian Surdykowski,
a financial professional
with The Manchester
Group



Gregory Mugnier,
a financial professional
with The Manchester
Group



Manchester, Mugnier, and Surdykowski enjoy crafting comprehensive financial plans for their clients. As part of their due diligence, the financial professionals acquire an understanding of each client's risk tolerance and long-term goals, as well as the things in life that are most important to them—from their children's education to the ability to use one's wealth to create a lasting legacy. Only then can they put the pieces of the financial plan together, utilizing products and tools available through FFR.

"Greg and Cristian have been fantastic additions to the group, and we will probably add a couple more [financial professionals] in the next year or two," Manchester says. "You don't get just one financial professional when you work with us. When we have a new client or prospect, we all meet with them to review everything in detail. Cristian may look at opportunities through insurance, Greg may run the numbers through the Asset-Map retirement planning tool, and I may look at the stocks and bonds. It's a collaboration."

The Manchester Group has another core area of focus: setting up cost-efficient 401(k) plans for business owners and their employees. Employers consider this service a "win-win" because they can save money by having the firm set up the plans, and their employees get the guidance they need to save for the future.

Manchester has built his business primarily through referrals. He also boasts a sterling retention rate. While he has changed firms a handful of times over the course of his 20-plus years as a financial professional, he estimates that 99 percent of his client base has followed him. He attributes his firm's success to responsiveness, hard work, and open communication, all of which are essential during times of peak volatility.

"The conversations we're having with clients right now are often reminders that we've built portfolios for them that can sustain them through times of volatility, because safety is our No. 1 priority," he says. "We're building balanced portfolios that will get you through times like this and also reap the benefits of a bull market. I want them to be able to put their head on the pillow at night with confidence and not worry about what the stock market's doing from one day to the next."

While Manchester spends his days—and sometimes nights and weekends—helping clients plan for what comes next, he's also thinking about his own future. He still likes the idea of opening a flower shop when he's ready to retire, though he has no intention of stepping away from his current gig anytime soon.

"I love this job so much, I can't even think about retiring," he says. "This is something I envision doing for at least another 15 to 20 years. My goal for now is to continue building our group, and we can do that only if we do right by every client we serve." ■

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