Meet Mark Wayton

Specializations:

- Retirement Planning
- Tax Planning
- College Planning
- Estate Planning
- Investment Portfolio and 401(k) Advice & Monitoring
- Social Security
- Medicare
- Insurance & Risk Management

Qualifications:

- CFP® (CERTIFIED FINANCIAL PLANNER™)
- CRCP designation (Certified Regulatory and Compliance Professional)
- BBA in Finance from Eastern Michigan University & MBA in Management from the University of Toledo

smartvestor

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Mark G. Wayton, CFP®, CRCP

One of Mark's objectives as a financial adviser is to empower people with knowledge to better help them reach their financial goals. He gets satisfaction from assisting families and individuals to successfully implement as well as understand the wealth management services he provides, such as retirement and tax planning and investment portfolio recommendations.

His wealth of knowledge comes from a robust financial background. Previously, he served as the manager of Advance Capital's Compliance Department. During that time, he became a Certified Regulatory and Compliance Professional through the FINRA Institute at Wharton. Since then, he has earned certification as a CERTIFIED FINANCIAL PLANNER™. Mark has been an integral part of the Advance Capital team since 2005.

Mark holds a BBA in Finance from Eastern Michigan University as well as an MBA in Management from the University of Toledo. He is also a member of the Financial Planning Association.

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ADVANCE
CAPITAL MANAGEMENT
One Towne Square, Suite 444, Southfield, MI 48076
455 E. Eisenhower Pkwy., Suite 300, Ann Arbor, MI 48108
p: **(800) 345-4783** • e: **mwayton@acadviser.com** • **www.acadviser.com**

Mark Wayton (continued)

p: (800) 345-4783

e: mwayton@
acadviser.com

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Were there any particular learning experiences that prepared you for this role?

In my prior role at Advance Capital in compliance, I had to learn the financial industry inside and out. The experience allowed me to see just how much bad financial advice is out there, which now helps me to educate clients on how the financial industry works and how Advance Capital is different.

Describe the importance of client education in your process.

I think the biggest obstacle investors can face is their own selves, and the way to overcome this is through education. It's why I take time to guide clients through the ins and outs of finance first, and then Advance Capital's philosophy. That way, clients learn how to set reasonable expectations as well as understand what they can control, such as costs, and what they can't control, such as the market. This knowledge can help clients avoid costly mistakes, which ultimately can help make them successful investors.

What do you think is important about giving back to your community – both at the firm and for you personally?

Giving back to your community not only makes a positive impact in the lives of others but also your own. It helps you recognize that you may not know what someone has gone through or what their circumstances are; therefore, you approach people with compassion and respect. This is certainly true in the workplace, which is why Advance Capital's various charitable efforts strengthen our commitment to helping others.

What does it take to be successful in your role?

In order to best serve someone as a financial adviser, I think you have to fully understand that person and his or her situation, which requires being a good listener. And, you can only be a good listener by truly caring about the person that comes to you for help. Once you get to know a client's specific needs, it is then crucial to have the technical know-how to meet those needs.

Fun Fact!

Another credential Mark has is a second-degree black belt in karate.
That means he can protect more than just a client's portfolio!