



SEAN CONDON CFP® - Financial Planner, Wealth Advisor



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Sean joined Windgate Wealth Management in 2006 and is a member of the investment committee. He is a Registered Investment Advisor. As a CERTIFIED FINANCIAL PLANNER™, Sean works closely with the investment team in order to communicate client goals and to discuss recommendations with clients throughout their relationship with Windgate Wealth Management. Sean began his career at Deutsche Bank Asset Management and has over ten years of experience in the investment industry. He is a member of the Financial Planning Association (FPA®) and serves on the Firefighters Pension Board of River Forest, IL, where he lives with his wife and two children.

Q: Why Did You Decide to Become A Certified Financial Planner?

A: One of the best qualities of working for a small firm is how closely I was able to work with industry veterans like Dr. Perritt and Michael Corbett at such an early stage in my career. Seeing how they were experts in their fields ignited my enthusiasm and drive to find my own niche in the financial industry. I already felt that working with clients was my passion. Increasing my knowledge and practicing my skills via the CFP® course load has enabled me to grow that passion in ways that I believe are having a positive effect on our clients' financial lives.

Q: What led you to the wealth management profession?

A: I actually graduated from UW-Madison as an English major, so I am used to getting sideways looks from clients when they learn of my background. Naturally I am informed by what I read, and it was one of my favorite books in my early twenties that led me into Finance, *Liar's Poker* by Michael Lewis. It's funny because Mr. Lewis has said that he wrote that book with the intention of dissuading the next generation from entering finance, yet it had the exact opposite effect on many young professionals. You can count me as living proof of that, though I am grateful that my own career has led me to help build wealth for individuals as opposed to facing-off against bond traders!

Q: What have you found is the greatest benefit of financial planning for clients?

A. The real benefit of financial planning is about setting positive expectations. When clients can see their *entire* financial portfolio (for example accounts we manage, 401(k) plans, other brokerage accounts, property and liabilities) all laid out in relation to their short- and long-term goals it becomes much easier to see beyond the market's chatter and noise. You realize there are aspects to your portfolio and your plan that are much more important than whether the market has gone up or down 5% in the past month. I think having this kind of perspective is a crucial element of successful investing. As we say often, one of our main responsibilities is helping clients with the difficult job of taking some of the emotion out of investing. Trusting your expectations can make seemingly difficult decisions become rather easy, like perhaps selling when market spirits are raging or buying when things seem most bleak.

CFP and Certified Financial Planner marks are certification marks owned by the Certified Financial Planner Board of Standards, Inc. These marks are awarded to individuals who successfully complete the CFP Board's initial and ongoing certification requirements. Those wanting to become a CFP professional must take extensive exams in the areas of financial planning, taxes, insurance, estate planning and retirement. Attaining the CFP designation takes experience and a substantial amount of work. CFP professionals must also complete continuing education programs each year to maintain their certification status.

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