

# Scottsdale's Brueckner Named Finalist for 2011 National Advisor of the Year

by David G. Leeper

Thomas K. Brueckner, president and chief financial officer of Strategic Asset Conservation in Scottsdale, was recently named a top-five finalist for a prestigious national honor bestowed annually by the editors of *Senior Market Advisor* magazine. SMA is the leading trade journal for financial advisors serving the retiree and pre-retiree market, and has been naming its Advisor of the Year since 2002. The magazine's editor, Daniel Williams, announced that this year's nominees were the strongest class of entrants yet, placing Brueckner in truly elite company.

In light of what the stock markets have done to many an investor's portfolio in recent years, Brueckner and his talented staff have some rather unique "talking points," credentials that would make many a stockbroker incredulous: *Not a single one of their 530-plus clients has lost money to the stock market since 2000—not even amid the financial meltdown of 2008.*

Secondly, neither Brueckner nor any of the advisors and staff on his team has ever had a consumer complaint in his 22 years in private practice. And perhaps most impressive of all, Brueckner has never lost an existing client to a competitor during his career, due largely to the previous two achievements.

How does he do it? "We have the best staff in the business, four amazing women who are brilliant, hyper-organized, thoughtful, and entrepreneurial—they think like a business owner, not like employees," Brueckner says.

He and his staff are also selective when taking on new clients. "We look for people with realistic expectations that suit our corporate culture. Many of our clients are snowbirds who also have homes in the Midwest, where they're originally from, and they've brought those values with

them to Scottsdale. They're conservative, family-oriented people who live within their means and were looking for a long-term relationship with a local advisor and an organization that believes as they do."

Brueckner, 51, who also has a summer practice in central New England, claims itinerant clients in 18 states and six countries, some of whom conduct their annual reallocations via email and phone appointments. "The trust has been earned, it's deep, and the affection is longstanding and mutual. It's pretty common to have clients hug my staff after an appointment, something that's fairly rare in our industry these days."

Brueckner has taken his business model nationally in recent years, as he and his staff now mentor other top advisors from around the country. "We teach a *relational* business model, rather than a *transactional* one. We avoid product purchasers; we're looking for clients-for-life, people who understand that the Internet can enhance an advisory relationship but can never take the place of that relationship."

Brueckner and his teams are certainly no stranger to awards in recent years. His NH office was the 2010 winner of the Better Business Bureau's *Torch Award for Marketplace Ethics*, an honor that the BBB confers on just one small business in a state each year. Thomas also received the *2011 NAIFA Quality Award* from the National Association of Insurance and Financial Advisors "for his dedication and exceptional service to clients, peers, and the industry." Lastly, Brueckner has been repeatedly named to the ranks of the Top 1% of financial advisors in the world by the Million Dollar Round Table, an elite international organization of high achievers from 76 nations around the globe. This year was Brueckner's ninth *Top of the Table* honor with MDRT.



Thomas K. Brueckner

So what makes for a good day at Strategic Asset Conservation? "Every day is a great day here," says Jennie Bond, Brueckner's office manager. "With a 'Client Family' that actively promotes our brand and our mission, every day in the office is a series of warm introductions and annual reunions with great friends..."

My wife and I are Strategic Asset Conservation clients ourselves, and of the half-dozen advisors we've had over the past 40 years, Thomas Brueckner and his staff are easily the finest of them all. Kudos to Thomas and his team for their good work, and congratulations on another well-deserved honor. ■

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