



WHY I DO WHAT I DO!



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I figure for a first blog post, I should introduce why I do what I do. It is somewhat of a long story that started my freshman year of high school. You see, I was sure that law school was where I was headed. I felt like arguing a case in court would be the ultimate job for me. Well, I needed to fill a part of my schedule with an elective class and the one that fit was a one semester course on entrepreneurship. My life changed forever!

Not only was I enamored with the opportunities that existed in building my own business (which one could do as a lawyer/attorney too, of course), but a portion of the class was dedicated to the stock market and trading fake shares to see how much money you could make by choosing the right stocks. This was before the internet, so I couldn't just google it or go to a myriad of sites for stock research, I really had to do my homework to learn about these companies. I started to get very excited by the whole stock market world and it made me start to re-think the direction I thought I would take in my professional life. Add to that the fact that I had grown up in a family with very little in the way of financial resources (spoiler alert, this is really what drives me) and I really started to think about how my future could be different, but I still didn't understand the financial world, nor did I have any concept of financial planning or that this was a potential career for me.

Fast forward to the year 2000, I am going to school part-time, working full-time at a car rental agency, because I was married young and I had a child on the way and sometimes you just do what you have to do. Well, I was passed over for a promotion for reasons that looking back today, I could have sued for with the explanation I was given, but that led me to start looking for a new job. The internet existed by then, but job searching was still done by looking in the classified section of the newspaper. I found an ad for a management trainee position and I went in for the interview. The company just so happened to be a financial planning company. This was fate, I just knew it! I studied for and passed my licensing exams and I was on my way, or so I thought. One big problem, I was only 23 years old and to make matters worse, I looked like I was 18. I found it very difficult to get clients to trust me with their hard earned money and so I had to work way harder than the other guys and gals that were with the same firm, but older and had transitioned to financial planning as a second career.

The first few years were very tough emotionally and financially and I did not stay with the same firm I started with for reasons that are not important, but I will forever be grateful to them for helping me get my start in an industry that I love to be a part of. As cheesy as it sounds, I am proud to do for a living something that has such a benefit to the clients I serve. I have a deeply rooted desire to help everyone toward meeting their financial goals and to prepare for the futures they dream of.

The best reward I have ever received in this business is having a family of a client that passed away tell me thank you and that they love me for what I did with their husband and father who had passed away to plan for their future and the comfort that they had in knowing that no matter how long his wife lived that she would be taken care of and that the kids were also receiving an inheritance then, and probably again when the wife/mother dies. I love what I do and I am passionate about helping others every day when I get out of bed.

The picture above, sums up my why for doing what I do. That is a picture of my beautiful wife of 19 years and our two wonderful children. That is all the motivation that I need to get up each day and do something that makes people's lives better.