

WEALTH.MANAGEMENT: EMERGING LEADERS



DILLAN MICUS: Under his leadership since 2006, AXA Advisors Southwest has grown from approximately \$5 million to more than \$18 million a year and averaged a 30 percent increase in staff each year – even during the recession.

Shifting the financial focus

Many fail to plan how retirement funds will be distributed, Micus says

Az Business: What challenges do you see your generation facing in regard to wealth management?

Dillan Micus: In regard to helping people my age with their actual wealth management challenges, I empower my team to use our Retirement Income Distribution Strategy (RIDS). Often, people spend all of their time focusing on pre-retirement accumulation, but fail to plan how those assets will be distributed during retirement, based on the things they want to actually do and places they actually want to go. This way of planning also neglects to address the most common risk factors that threaten one's seemingly perfectly planned retirement years – longevity, inflation, taxes, interest rates, volatility and emotions. Through RIDS, we help our clients organize their money

into three buckets – a cash reserve bucket, lifestyle bucket and inflation fix bucket – thereby creating a greater level of certainty that they will be able to live the lifestyle they want to live in retirement.

Moving on to actual wealth managers in my generation, I see two clear challenges, both of which AXA seeks to turn into opportunities.

First, those in my generation are neither “starting out” in their wealth management careers, nor approaching retirement. More often than not, they are eager for autonomy. So, we give it to them via an uncommon approach to comprehensive planning I developed called “Firm of Firms,” which empowers our best people to launch their own firms with our back-end support. This, in turn, allows our clients to receive a very high level of support and resources through

DILLAN MICUS, 37
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one specific firm while getting the experience of other firms within the family of offices to focus on each integral part of financial management.

Second, those in my generation grew up very close to the “Me Generation,” but it is critical that those in my industry focus on being a “We” generation, meaning community engagement and servant leadership. I model this as a long-time member of the Boys & Girls Clubs of Greater Scottsdale board as well as my work as a Thunderbird. Our office also sets aside one day each year to volunteer together, even going so far as to put on our own charity event as a team. **AB**

JOHN ARNOLD, 37

Co-founder and CEO
Southwest Wealth Strategies
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Arnold focuses on providing innovative and practical financial programs for clients, including fee-based asset management and retirement income distribution strategies.

He is passionate about fundraising for the Military Assistance Mission, which provides financial and morale aid to current Arizona active-duty military, their families and wounded warriors, regardless of overseas deployment status.

CLAYTON JANSON, 37

Founder and CEO
Phocus Financial Strategies Group
phocusfinancial.com



Janson heads a multi-disciplinary team focused on providing financial, investment, insurance and estate planning strategies throughout Arizona. Last fall, he

expanded into New Mexico. Janson also serves as chair of Weekend Jetaway, a culinary event set in a private jet hangar that raises funds for the Boys & Girls Clubs of Greater Scottsdale and the Pat Tillman Foundation.

JAMESON VAN HOUTEN, 38

President and founder
Stonegate Financial Group, LLC
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Van Houten founded one of the top boutique wealth management firms in Arizona. He specializes in wealth management services to institutions, businesses

and high net worth individuals. Headquartered in Scottsdale, Stonegate manages more than \$210 million for 190 clients throughout the U.S. He was awarded Most Outstanding Graduating Senior at ASU's W.P. Carey School of Business.