

# Robert “Bo” Aylin, III

*Partner of PrairieView Partners, LLC  
Wealth Advisor*



Bo Aylin got his start in financial services as a stockbroker, learning first-hand how difficult it can be to help clients think long-term when the relationship is based on transactions. He brings that investment experience to PrairieView Partners, counseling clients on investment and retirement strategies, life insurance and estate planning, and charitable giving. He also has extensive experience in designing 401(k) and other retirement plans for small businesses.

Bo attended the University of Vermont, earning his undergraduate degree in Political Science and Psychology.

He obtained a Master's degree in higher education administration from Colorado State University, and worked for several years in various student life positions at colleges in Colorado and Minnesota. He made a career change to the financial services industry, gaining Series 7, Series 65, and life insurance licenses, working as a stockbroker and financial advisor in Minneapolis. He spent eight years with a private wealth management firm as a senior financial planner, working directly with more than 170 clients representing \$300 million in assets. He also became the firm's small business 401(k) and retirement plan specialist. He co-founded PrairieView Partners in 2007.

“Like many people in our industry, I got my start at a full-commission brokerage firm. The key mantra of sales managers was, ‘Fake it till you make it.’ I decided that if I was going to stay in the business, I wanted a very different kind of relationship with my clients, a relationship that addressed all of the client's needs. I wanted to work with a team devoted to transparent relationships with clients, sound investment principles, and a commitment to comprehensive wealth management. That is our mission at PrairieView Partners.”

## *On working with clients...*

Most people don't think of themselves as “wealthy,” nor as needing the advice and counsel of a wealth manager. But many of us have more complicated financial lives than we realize. We need help establishing financial priorities, developing and executing investment strategies, and, most important of all, thinking long-term about our financial strategies and decisions.

The compensation of a typical stockbroker is not necessarily aligned with the long-term financial goals of the client. Most investment firms' training programs are more about sales methods than investment knowledge. There is little, if any, attention given to financial planning, taxes, developing an estate plan or a strategy to save and invest for retirement. That's why at PrairieView we spend so much time getting to know our clients: we're more interested in what they want to achieve than in what they have in their trading accounts.

## *An integrated perspective...*

In my work life and my personal life, relationships are vitally important. The most rewarding part of what we do at PrairieView is build solid and enduring relationships with our clients. They are partnerships based on trust and respect. We learn each other's stories, concerns, and aspirations. There is genuine care that runs both ways.

With that foundation of trust, we are able to shape a comprehensive strategy for managing every aspect of our clients' financial lives. We know our clients well enough to ask the "have you thought about...?" questions. We know them well enough to make the "we think you should consider..." recommendations. And our clients know that we know them. They know that we know our business. And they know that our recommendations reflect their long-term goals.

## *Education and professional experience...*

I was born and raised in Houston, Texas, but moved to a small Vermont ski town for my high school years. I stayed on to attend the University of Vermont, where I graduated with a double major in Political Science and Psychology. I earned a Master's degree in higher education administration from Colorado State University. I worked in student life at colleges in Colorado, North Carolina, and Minnesota for seven years, learning how to listen to people from all walks of life. It was very satisfying to be able to help young people as they worked through some of the big life-altering questions.

I made a career change, obtaining my Series 7 and Series 65 securities licenses, as well as a life insurance license, and joined Dean Witter as a stockbroker. Interested in a more substantial role in my work with clients, I moved to Charles Schwab as a financial advisor, and from there to a private wealth management firm, where I worked for eight years as a Senior Financial Planner. There I led the development of a comprehensive financial planning function, working with over 170 clients representing \$300 million in assets and serving as the firm's small business retirement plan/401(k) specialist.

As a founding partner at PrairieView, I continue to pursue professional interests in financial planning, risk management, charitable and estate planning, and small business retirement plans. But my primary daily focus is on working with our clients.

My professional memberships include the St. Paul Estate Planning Council and I regularly participate in conferences and programs organized by the Financial Planning Association.

