

Merrill Financial Advisor Brian Shambo Introduction to Shambo | Schwibner Wealth Management

Running Time: (2:08)

I'm Brian Shambo and I lead the Shambo-Ashdown Wealth Management Group and I manage the Merrill branch in Vero Beach, Florida.

I have two children and family is everything to me and it's important to every one of our clients. And understanding the full dynamics within a family, it's the only way you're going to be able to find out what's making people tick or what motivates people or what're their goals and what are the challenges that we're going to face. It's not just about investments, it's about educating and empowering the families to learn, to understand the business and to make their own educated decisions in the end.

We want to go above and beyond and help people. We want to do that, that one thing that makes them say "wow, you know, they actually really care, it's not just about my money" and when we get that response, that's what counts.

One of the really neat things that we've seen happen in our practice is multiple generations and working with each of the generations and we have a client that came in just the other day he is the grandson of one of our early clients. And when we get to achieve the goals they want, whether it be succession planning or college education or saving for children, it's the most fulfilling feeling that you can get.

To match our multi-generational client-base we also have a multi-generational team. I have a wonderful team, and between the age and demographics, gender, you name it, we can connect with any age. Our practice is diverse.

What really sets us apart is that we offer access to the banking convenience of Bank of America and the investment insights of Merrill Lynch. We really feel like we have the experience, the knowledge, the tools to meet the needs of each and every client and we believe that there's no other firm on the street that can compete with what we do.

[Barron's Award]



I'm Brian Shambo and I'm proud to be a Merrill Financial Advisor.

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