

Making a Positive Impact on Lives One Question at a Time

Mainsail Wealth Advisors LLC

Not many wealth advisors are asked by their clients which health insurance plan might work best for their family or whether they should buy or lease an automobile. But the team at Mainsail Wealth Advisors gets questions like that all the time.

"It's humbling to be asked those types of questions," says Scott Haley, managing partner and branch manager, "but it's a pleasure to be so engaged in our clients' lives that they rely on us to help them make those decisions."

"We have one agenda. And that is to solve our clients' needs and help them reach their goals."

– Scott Haley, Managing Partner and Branch Manager, Mainsail Wealth Advisors

It's not hard to see why, since all of the team members at Mainsail are deeply rooted in the communities in which they live. Haley, for example, is a youth soccer coach, a former Rotary president, and is active in his church.

Nearly all of the firm's clients were referred by someone who has had a relationship with Mainsail. But the firm doesn't cater only to Virginia residents, as nearly 20 percent of its clients live outside the state, drawn by the services Mainsail provides.

"The most rewarding part of our job is helping our clients plan their retirement and



From left: Scott Haley, Jason Koptish, Judy Mansfield, Scott Glaze

designing the strategies that accomplish their goals," Haley says.

Solving Problems

Mainsail Wealth Advisors' multigenerational team works primarily with retirees and those who are nearing retirement, as well as business owners. In addition to managing individual stock, bond and mutual fund portfolios, it helps clients design and execute effective estate and tax strategies.

"These are challenging times and our investment strategies are managed to help clients achieve their goals but more importantly protect them in turbulent markets," says Managing Partner Jason Koptish. "For a lot of our clients risk management is just as important as growth."



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"I love the opportunity to sit down with someone new, look at their situation and create solutions that improve their life plan," adds Managing Partner Scott Glaze. "It's really an honor to be part of that and help them in any way that we can to help them live the retirement that they dreamed about."

While part of the Raymond James Financial Services family, Mainsail is an independent firm that "doesn't have a corporate entity pushing us into making recommendations," notes Judy Mansfield, managing partner.



"We have one agenda," Haley says. "And that is to solve our clients' needs and help them reach their goals. We are able to assess a client's situation and use any strategy to help them get there. Once you figure out what you want to do, the investments almost fall into place by themselves."