

# Leading Your Financial Team

Like a puzzle, your financial picture incorporates many interdependent pieces.  
This advisor helps fit them all together.

**After Sam Thornal finished** putting himself through Baylor University, he joined one of the “Big 5” consulting firms.

What drew Sam to consulting was being part of a team that solved problems. “After a couple of years of consulting, I decided that I still wanted to be part of a team that solved problems, only I wanted to do it for individuals, families, and small businesses rather than Fortune 500 companies.”

Today Sam runs a fee-based financial planning practice affiliated with Ameriprise Financial. While Sam enjoys giving advice on fundamental and popular financial topics such as investment, retirement, education and estate planning strategies, his real passion is being at the center of a client’s “financial team” along with an accountant, an attorney and—many times—a real estate agent and mortgage broker.

Sam enjoys the challenges of a comprehensive planning approach. He earned his Certified Divorce Financial Analyst designation to add another layer of knowledge to help clients through a tough process.



**Sam Thornal II, CFP®, CDFA™  
ChFC®, CRPC®, Financial Advisor**

An active member of the Plano community, Sam and his wife, Alison, are a Big Couple as part of Big Brothers Big Sisters. “We’re passionate about giving back to organizations that support children,” Sam says.

What Sam discovered was that many clients didn’t have a team like this in place, so over the last decade, Sam has worked to forge relationships with other professionals. When a client wants a “one-stop shop” approach, they can appreciate the network of experienced, knowledgeable professionals that Sam can recommend.

## Sam's Network

It’s very clear Sam is passionate about the benefits this approach can have. “Having multiple professionals working together for the client goes beyond the adage that ‘two heads are better than one,’”

Sam notes. “It allows me to find unique solutions for a client’s situation and then discuss those ideas with a team of specialists before visiting with my client. This way my client does not have to have several conversations with multiple professionals, which would place a burden on their time. After all, that’s why they hired me: to help them solve their financial problems.”

Working with the client’s professional team helps Sam go far beyond the rudimentary planning offered by many other advisors to uncover and be proactive about problems before they ever become an issue for the client. The running joke among Sam’s clients is that “Sam’s that guy who knows a guy.” Sam tells prospective clients in their first meeting with him: “If you just want a person to give you the latest stock picks or to just sell you insurance, I’m not your guy.”

Sam’s value is being at the center of a client’s financial life, helping them navigate life’s financial complexities.

“I’m the one person on the client’s team who meets with the client on an ongoing basis to help them coordinate all these moving pieces,” says Sam. “By helping you lead your team, I ensure that we all stay focused on your best interests.”

To learn more about your financial picture, attend one of Sam Thornal’s seminars on retirement and tax planning strategies. Visit [www.ameripriseadvisors.com/sam.l.thornal/events](http://www.ameripriseadvisors.com/sam.l.thornal/events) or call **972-866-7960** for a list of upcoming events.

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