

Reflections of a Woman in Business

What 20 years taught me about care, community, and leadership

BY: **TINA MISTRY, CFP®**

I am honored to have this article accompany The Business Journal's Women in Business / How She Leads special issue. To be included alongside so many remarkable leaders and changemakers in our community is both a privilege and a humbling experience. Every day, I am inspired by the people around me—individuals who lead with integrity, take risks, build businesses, and invest their time and energy into making our community stronger. This issue is a celebration of those efforts, and I am grateful for the opportunity to share my perspective.

This year also marks an important milestone for me personally: twenty years with Portfolio Advisors. The firm itself has been serving families and businesses for more than 35 years, and I am proud to follow in the footsteps of incredible people who came before me—people who took chances, offered mentorship, and demonstrated what it truly means to put clients first. Their examples shaped not only how I do business, but how I define leadership.

My story is deeply rooted in Fresno. I grew up here, and today I am raising my family here. I am a product of the Clovis Unified School District and a proud graduate of Fresno State's Craig School of Business. My education and this community played a formative role in shaping who I am, both professionally and personally. Fresno has always felt like home, and that sense of belonging has influenced my desire to build something meaningful here—not just for today, but for the future.

Giving back to the community is something I feel strongly about. To me, success is not measured solely by professional milestones, but by impact. It is about helping build a place that can thrive long after we are gone. Each of us has a role to play, whether through leadership, service, mentorship, or support. Investing in our community—big or small—creates ripples that extend far beyond ourselves.

My journey with Portfolio Advisors began in 2006, when I was a college student who needed a job and knew only that I wanted to work in finance, whatever that meant at the time. I was

fortunate to land at Portfolio Advisors, a firm that valued relationships, integrity, and long-term thinking. In 2007, after graduating, I was offered a full-time position with the opportunity to become an advisor. By 2012, I had obtained my credentials and licensing. In 2014, I was offered a one-third partnership. In 2020 and 2021, I successfully bought out my business partners, becoming the sole owner of the firm by the end of 2021.

Through every phase of that journey, one message remained constant—one I can still hear in the voices of those who mentored me: take care of clients, and everything else will fall into place. That principle has proven true time and time again. Relationships matter. Trust matters. When you lead with care, the rest follows.

The financial services industry does not always have the best reputation, and I understand why. Many people have experienced broken trust, confusing advice, or relationships that felt transactional rather than supportive. I am passionate about changing that narrative. There are exceptional independent financial advisors who take their responsibility seriously—who understand that behind every financial plan is a lifetime of hard work, sacrifice, fear, hope, and uncertainty.

As much as financial planning is about numbers, it is also about walking alongside people through some of the most emotional moments of their lives. Markets can be scary. The future can feel uncertain. Choosing to trust an advisor with your financial picture takes courage. At Portfolio Advisors, we never lose sight of that responsibility. Our role is to provide clarity when things feel overwhelming, reassurance when emotions run high, and steady guidance through both calm and challenging times.

A twenty-year career is not built alone. I am deeply grateful for the support of my husband, my children, my parents, my family, and my friends. They make it possible for me to pursue work I am passionate about and support my ambition in ways that often go unseen. Long before my career in finance began, I learned valuable lessons working at my parents' Hallmark store starting at age thirteen—lessons

in customer service, perseverance, stepping outside my comfort zone, and what it truly takes to run a business. Those long holiday hours taught me resilience, and they were often followed by my mom's incredible Indian lasagna—a family tradition that made the hard work feel worth it.

Over the years, I have learned that when you take care of clients, everything else aligns. Being there for the families we serve is at the center of everything we do—from how we deliver our services, to how we present ourselves, to how we give back to the community. Clients are not just part of our business; they are the reason for it.

As a leader, I strive to be the person I would want to follow—someone willing to push the cart uphill, shoulder responsibility, and work toward a shared vision for the company and the families we serve. Leadership is not easy, and I am far from perfect. I have made mistakes and learned difficult lessons. Growth, however, is about improving a little each

day—showing up better for your clients, your family, and your community. Over time, that mindset compounds into something truly meaningful.

I am proud of where Portfolio Advisors has been, and even more excited about where we are going. Guided by trust, grounded in community, and driven by care, we will continue to walk alongside the families we serve—honoring their stories, protecting their futures, and building a legacy that extends far beyond the numbers.





PORTFOLIO
ADVISORS INC.



“I’m the only one here who works for treats. The rest of us work for your future.”

Remy, Chief Morale Officer

Strategic Financial Advice for:

- Mid-Career Professionals
- Those 5-7 Years Away From Retirement
- Current Retirees



SCAN HERE

Discover how to align your capital with what matters most.

Start with a complimentary consultation!

Call or visit our website to schedule your first appointment.

Our Mission: Enriching Lives Through Transformative Action

 7571 N. Remington Avenue, Suite 105, Fresno, CA 93711
  559-432-8400
  www.PortAdvisors.com

