

Frequently Asked Questions

How will you help identify my goals and monitor my progress toward reaching them?

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In our first meeting, we will gain mutual understanding of your goals and priorities. Based on those goals and priorities, we will offer proposed solutions that agree with your objectives. As part of our ongoing partnership, we will collaborate with you to determine action steps and follow up plans.

Who are your typical clients?

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In terms of stage of life, our typical clients are retirees, individuals within 5-7 years of retiring, and mid-career professionals and executives with families. In terms of professions, we work with a broad audience. However, we have the current commonalities amongst our existing clients: C-suite executives or managers, small business owners, medical professionals, teachers & administrators, and public employees.

What is your team's experience in the industry?

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Portfolio Advisors was founded in 1990 by Gary Leffler who was a CFP® professional with 30+ years of experience in the financial services industry. His son, Mike Leffler who was also a CFP® professional, joined the firm in the mid-90s and eventually became the owner of the firm in the early 2000s upon Gary's retirement. Bill Thompson, also a former CFP® professional, joined the firm in the mid-90s, having a career as an advisor for over 20 years and retiring in 2017. Tina Mistry joined the firm in 2006, becoming a CFP® professional in 2012. Ken Hatfield, after a 30-year career in the newspaper industry and having been one of Gary's original clients, joined the firm in 2011, and he along with Tina became managing partners of the firm in 2014 alongside Mike. Ken retired in 2020 followed by Mike in 2021, when Tina became the sole-owner of the firm in September 2021.

Under the tutelage of the advisors that came before her, Tina has over 19 years of experience as a financial advisor. Her colleague, AJ Flores, also a CFP® professional, who began as an intern in 2014, now has over 10 years of experience in the industry working directly with clients. Tina and AJ work in conjunction with up-and-coming young advisors, working in teams to best serve clients and provide them with the most current planning strategies and knowledge.

With whom will I be working?

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Portfolio Advisors prides itself on working in a team environment. Your Lead Advisor will work with you on a regular basis alongside an Associate Advisor and other team members to provide additional expertise as needed. Normally there are two advisors present during client meetings and support staff that will also work closely with you. Our entire team of professionals will become familiar with your overall picture and are available to help you as needed.

Will you help me with more than just investment recommendations?

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Portfolio Advisors offers extensive experience in multiple areas of financial planning. We can help with a broad range of services that include portfolio management, investment and tax strategies, assistance with trusts and inheritances, retirement planning, income replacement strategies, and planning for education costs. We aim to work with families in a comprehensive manner over long periods of time as we believe in building relationships and our work is not transactional.

Our Mission: Enriching Lives Through Transformative Action

What services do you offer?

We offer a wide range of services, including Retirement Planning, Investment Management, Tax Planning, and Estate Planning. Our focus extends beyond just investments to address various financial needs and concerns.

What sets you apart from other financial advisory firms?

We stand out by bringing a unique blend of compassion, knowledge, and trustworthiness to the table. As CERTIFIED FINANCIAL PLANNER® professionals and Investment Advisor Representatives, we operate as a fiduciary, always serving your best interest.

We also stand out with our ability to address pain points specific to retirees, individuals who are within 5-7 years of retiring, and mid-career professionals with growing families.

Lastly, when you contact Portfolio Advisors, you are going to get one of our team members who is ready to help you. No call centers with long waits. REAL people with rapid responses who genuinely care about your financial well-being.

How do you charge for your services?

Portfolio Advisors does not sell products or receive commissions for the investment vehicles which are recommended to clients. Portfolio Advisors is a fee-only firm and compensation comes directly from client assets under management. Fees are customarily deducted from client accounts on a quarterly basis.

Do you work with clients outside of Central Valley?

Yes, we proudly serve clients not only in Central Valley but also across the country. Our commitment to being a fee-only firm means we have your best interests at heart, regardless of your location.

What can I expect from your financial planning process?

Our financial planning process is customized to your unique needs and goals. We work closely with you to simplify complex financial concepts, ensuring you feel empowered rather than overwhelmed. Additionally, you can expect NO JUDGMENT. Discussing your finances can be difficult and tricky. We are here to make this process as simple as possible because everyone deserves to have financial well-being.

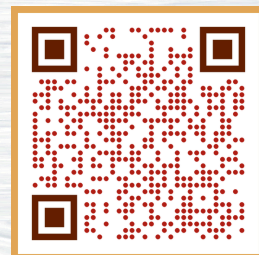
How can I get started with your services?

You can take the first step by completing our [Financial Guidance Assessment](#) to help determine if we are a good fit for you as well as identify what is most important to you. You may also contact us directly through our website or by phone. We'll be happy to schedule an initial consultation to discuss your goals and how we can help you achieve them.

What is your approach to financial planning?

Our approach is comprehensive, transparent, and educational. We aim to put you at the center of your financial picture, simplifying complex concepts, and providing a customized plan that suits your unique circumstances.

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Our Mission: Enriching Lives Through Transformative Action

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