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## Paula Chessser

Taking the fear out of finances

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## Taking the fear out of finances

When discussing investments and financial matters, something strange can happen. Columns of digits that otherwise would have no meaning transform into hopes and dreams. Each series of numbers becomes a part of a potential future. Perhaps they represent a college education, a house to call home or leisure time worth years of hard work. No matter what the goal, Paula R Chesser, Senior Investment Consultant at Baird, helps her clients turn dreams into realities.



## Paula R. Chesser

With over 30 years of experience in the financial services industry, Chesser has long loved working in the field. “My love for investing began at age 26 when I was first exposed to an opportunity to invest in an initial public offering,” she says. From past to present, she has continued to work for her clients with an understanding of the weight of her work. Chesser joined Baird in September of 2000 and has since worked with her team to make “putting the client’s interest first” more than just a saying. “Our team understands what we do has a direct impact on our clients’ lives and we take that understanding very seriously.”

Investments can be intimidating. They involve crafting a plan of goals and hopes that stretch far into the future. “Most people are driven by a purpose that goes beyond their immediate needs and concerns. It’s about who we are and what we want to accomplish in life that motivates and inspires us on a daily basis,” says Chesser.

Determining what a client really wants is accomplished through the understanding that communication is key. “Without it there is no relationship and without a good relationship, there is no trust.” By communicating well, Chesser can help an entire family understand their financial plan. “Growing up, my parents regularly enjoyed open conversations about money, budgeting and savings. Dad was the breadwinner while Mom spearheaded the investment decision-making and ran the household budget,” says Chesser.

Expanding the plan even further, Chesser encourages discussing with children how to save and invest, as well as the reasons why. By utilizing basic bank sav-

ings accounts, tracking how money accumulates over time and discussing the basics of mutual funds, stocks and other investments, young ones can establish good financial habits early on. “So much of what the child learns is from the parent and their personal outlook on money. The parents that make it fun and educational find it time well-spent with their children.”

Through a consultative process called the Chesser Wealth Management Experience, Chesser works to accomplish the wants and needs of clients. Chesser has developed many ways to tailor her financial services to her clients’ specific situations, such as the Lifestyle Wealth Management Plan, the Purposeful Wealth Process, and her electronic newsletter called the “Chesser Report.”

Often, subjects that strike fear into the heart can be conquered through knowledge and the confidence that comes from it. Throughout her career, Chesser noticed that many women feel uncomfortable and overwhelmed when stepping into decision-making roles for their investments. “It was clear to me that the financial services industry had simply missed the boat by not recognizing the value and unique concerns of the female client,” she says. Empowering women to feel confident and comfortable with their financial decisions spurred Chesser to create the Savvy Women Club in 2011. Although membership to the club is reserved for Chesser’s female clients, all women interested in learning more about financial responsibility are welcome to attend the events.

### *Savvy Woman Club*

“Whether you are a single woman or the CEO of your family you deserve an environment that encourages you to embrace your financial life before an unexpected event occurs” says Chesser. A variety of educational and specialty events are designed specifically to deepen your knowledge and elevate your confidence as you embrace your financial life. Visit [paulachesser.com](http://paulachesser.com) to learn about upcoming events.

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