

Conversations That Help Women Stand Their Ground

Simple Impact LLC

Shannon “Shān” Sutherland, AIF®, AAMS®, ADPASM would much rather talk to her clients about her reading list – and theirs – than boast about her financial industry credentials and awards.

(Among her all-time favorite books: *What It Takes to Be No. 1* by Vince Lombardi Jr.; *Earning It: Hard-Won Lessons from Trailblazing Women at the Top of the Business World* by Joann S. Lublin; *Women Who Run With Wolves* by Clarissa Pinkola Estés.)

“It’s a much better way to start the conversation and find common ground,” says Sutherland, CEO of Simple Impact LLC, in Santa Monica, California.

For Sutherland, investing means much more than purchasing stocks, bonds and mutual funds. “It means focusing our resources of money, time and expertise on what’s going to produce what we want the most,” she says. “The work I do with women, for example, is an excellent investment.”

But then, Sutherland has always done things a little differently, starting with her “gender investment strategy.” “It’s intuitive to me to choose companies promoting female senior leadership roles, because I believe women – if you follow the money – are going to change the world,” she explains.

Over the past 12 years, Sutherland has built a thriving wealth advisory practice serving the needs of “successful people who think the world is small,” including many “influential” women and senior-level executives. A large part of her practice is devoted to seminars helping clients achieve the financial base they need



Shannon “Shān” Sutherland

“to rise up and succeed.” As her clients move higher professionally, she takes pride in remaining “one of the few trusted voices and perspectives in their lives.”

Sutherland credits her operations support network at Commonwealth Financial Network, the nation’s largest privately held independent broker/dealer - RIA for “liberating me to actually do my work. . . . Working with Commonwealth, our firm remains independent and free to act solely in our clients’ best interests,” she says.



Simple Impact LLC

‘You Don’t Know What You Don’t Know’

For all her experience and credentials – including a personal financial planning certificate from UCLA, a California Life and Health Insurance license, and an Accredited Domestic Partnership AdvisorSM designation – Sutherland remains humble. Etched onto a favorite mug, positioned where it’s almost always in view: *You don’t know what you don’t know*. “This is a constant reminder for me to make sure I keep the conversation a two-way dialog,” she says.

“Usually when a client comes to see me, they’re going through a life transition. Something is happening or is about to happen in their lives, and they’re looking to me to help them get unstuck when it comes to their money. My job is to give them action steps to help correct their trajectory. So I stop what I’m doing, listen and then shift into high gear. This is where I’m at my best.”

Workshop Tools for Creating a Solid Financial Base

- *Net-worth statement* – “Because you have to know what assets you have to work with.”
- *Income statement and budget* – “Because you have to know how money flows in and out of your bank account.”
- *Money archetype or personality* – “By identifying your money archetype or personality, and understanding why you make the financial choices you do, you can modify distractions that are barriers to reaching your goals.”
- *Kickstart momentum and intention*

2665 Main Street, Suite 240B | Santa Monica, CA 90405 | 310-773-4411 | simpleimpactllc.com/featured-event

Shannon Sutherland is a Registered Representative and an Investment Adviser Representative with/and offers securities and advisory services through Commonwealth Financial Network®, Member FINRA/SIPC, a Registered Investment Adviser

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