Taking experience in a new direction

It's said that there's no substitute for experience. Jason Witrock would have to agree. Jason had an eventful start to his professional career. He hit the ground running as a student at Northeastern University, participating in its co-op program with a large wealth management firm. Following graduation, he headed to Wall Street, where he ultimately landed at the sales and trading desk of a major firm. For more than a decade, Jason built a successful career, gaining deep insight into the financial markets.

Something was missing, however. Entrepreneurial by nature, Jason yearned for the opportunity to build his own business. Through a chance connection, he took a position in Miami working as a financial consultant to a cruise line. Immediately, he fell in love with Miami. He relocated his family and began to look for a role that would capitalize on his strengths: in-depth financial knowledge grounded in natural drive and ambition. Returning to his roots, Jason realized that wealth management would give him the structure and substance he wanted, with the self-direction he craved. He accepted an offer from Merrill Lynch in September 2011, and his hiring manager enrolled him in the Practice Management Development (PMD) program.

Jason believes that the practical insight he gained from PMD was invaluable to his long-term career. While he was familiar with financial markets, instruments, and analysis, he had less direct experience with prospects and clients. Hearing firsthand accounts from successful financial advisors about their own business development efforts, Jason gained in-depth insight into client needs, prospecting tools, and practice management strategies. "I re-educated myself about a different side of the business," he recalls.

Jason points to the program's emphasis on coaching and mentoring as particularly useful. "By bringing in financial advisors who shared their real-life stories, PMD provided us with proven strategies that we could model." Jason also treasures the insight he gleaned from his mentor, an experienced financial advisor who is now his business partner and a good friend. "Learning about techniques, products, and strategies from proven producers can open new doors in your own career."

Now an established advisor, Jason applies his own entrepreneurial bent in the service of entrepreneurs; he advises a number of business owners, affirming, "I understand their business." He also works closely with executives, retirees, and multiple generations of families. Looking back on his professional development, Jason is candid about the effort and focus it required. "You can't be afraid of hard work," he asserts. "You never know when you are going to learn something that is relevant or helpful to you or your clients." He also underscores the need to be forward-thinking, resourceful, and organized. "No one is going to spoon-feed you success. You have to strive to do more, learn more."

For Jason Witrock, doing more and learning more are core tenets of his outreach as an advisor. He believes his work offers him a very personal connection to clients, one that is grounded in the knowledge and insight that can only arise from experience.

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