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M. Chad Lowe, left, Wayne Smith III and David Dryden.

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Insight Wealth Partners LLC

The company's approach is perspective, discipline and stewardship.

Insight Wealth Partners LLC announced its launch as a fee-only, independent wealth management and advisory firm in mid-2010 and is headquartered in Plano. Previously affiliated with Ameriprise Financial's elite private wealth adviser group, Insight Wealth Partners' three founding principals – David S. Dryden, Travis D. Carter and Wayne Smith III – combine over half a century of professional expertise as certified financial planner practitioners. The firm's experienced financial advisers, high-touch client concierge team and seasoned operations staff all share the same mission: to guide and support its clients in designing and implementing the financial plans and wealth management strategies that will allow them to focus on leading rich, purposeful and fulfilling lives.

Services are tailored to high-net-worth families who are at or near retirement and successful executives who need creative financial solutions.

Insight's disciplined approach to wealth management allows it to see past the present and prepare clients for the certainty of uncertainty,

Dryden said. It is this discipline, woven throughout the financial planning process, investment management strategies and superior client service, that enables Insight's clients to stay on course.

That perspective, combined with the client's vision of the future, best enables the realization of Insight's goals. "We take the time to explore client financial needs, personal economy and special considerations to develop a customized wealth strategy positioning each client to achieve their goals," Dryden said.

One of the biggest differentiators is that Insight looks out for the client's best interest and has no hidden agendas, he noted. Compensation is completely transparent.

"The financial industry is very heavily product-based and very heavily transaction-based, though as a firm we have chosen to be neither product-based nor transaction-based," said Dryden. "That's probably the biggest difference here. We are independent and do not get paid by any investment company. There are independent advisory firms that still affiliate with what's called a broker dealer, meaning a company that sells investments, but we have chosen not to do that.

We get no compensation whatsoever from anyone but a client."

Insight does no outbound marketing or advertising, but rather depends on word of mouth. "We do a good job and have the belief that clients will tell other people how great we are, and our business will grow – and it has," Dryden said.

Insight brought on a fourth partner, M. Chad Lowe, in 2010. Prior to joining the team, Lowe spent 12 years running a private wealth advisory practice at Ameriprise Financial Services Inc. Insight also welcomed two financial advisers in 2010. Prior to joining Insight, David Chin spent 19 years as a financial adviser with Ameriprise Financial, including the last 13 years as a financial adviser with Middlebrook, Dryden, Carter & Associates, a private wealth advisory practice of Ameriprise. Ryan Ferguson previously worked as a certified public accountant at RSM McGladrey Inc. and McGladrey & Pullen LLP, the fifth largest public accounting firm in the nation.

Insight Wealth is just under \$200 million in managed assets. "It's a great start," Dryden said. "We just want to be honest and do good work." ■

- Gail Bennison