

INSIGHT 2006 PRE-SHOW ISSUE

# boomer™

MARKET ADVISOR LIFESTYLE ASSET MANAGEMENT

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## THE FINALISTS



ENTHUSIASM. CREATIVITY. FORWARD THINKING.  
(AND YES, ASSETS UNDER MANAGEMENT)  
THE 2006 ADVISOR OF THE YEAR CONTENDERS.

### PRACTICE MANAGEMENT

Bridge the broker/dealer  
marketing gap

### WORKING ASSETS

The excitement  
in exchange-traded funds

### FORWARD MOTION

The IRA rollover  
market potential

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## ERIN BOTSFORD

THE BOTSFORD GROUP  
\$425 MILLION  
IN ASSETS UNDER MANAGEMENT

To say Erin Botsford had it rough is an understatement; Oliver Twist is more like it. After the unexpected death of her father when she was 11 years old, Botsford faced economic hardship and outright destitution more than once during her formative years. Anything she's set out to do she's had to do herself, which explains her drive and overwhelming success in what is still very much a male-dominated industry. By overwhelming success we mean \$425 million in assets under management, offices in Atlanta and Dallas, and an average client net worth of between \$5 million and \$8 million. Licensed since 1989, Botsford began preparing for the boomer retirement wave as far back as 1995.

"I initially started out by trying to sell 'me' to my clients, meaning my personality and my style," she says. "When I stopped trying to sell me and started selling our comprehensive and methodical process, that's when our business exploded."

"We serve as a reality check for our boomer clients," she adds. "We believe in a properly allocated mix from a product and strategy standpoint so our clients have lots of legs under them."

But more than anything else, she says, she offers her clients the confidence to retire comfortably — which after hearing Botsford's story, we assume is an easy sell.