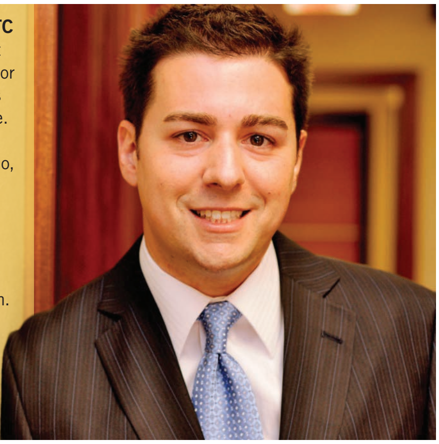
Personal Planning for Every Portfolio

Carlos Dias Jr.

Excel Tax & Wealth Group | MVP Wealth Management Group

It's the rare advisor who boldly goes in opposite directions and succeeds on both fronts.



Carlos Dias Jr., RFC®, CLTC is a financial planning expert and fee-only financial advisor who is widely sought for his unique industry perspective. Dias has appeared on CBS affiliate WKMG-TV in Orlando, is a frequent contributor to *MainStreet* and *TheStreet*, and has written for other leading industry resources including *Fortune*, MSN Money and WealthManagement.com. His official website can be found at carlosdiasjr.com.

Carlos Dias Jr., RFC®, CLTC began his career in the financial industry in 2004. A decade later, he is the founder and principal of two fast-growing enterprises. Excel Tax & Wealth Group, an Orlando-area financial advisory firm, offers strategic financial planning services to high-net-worth individuals, business owners, executives and retirees. MVP Wealth Management Group addresses the unique concerns of professional athletes, sports agents and entertainers.

These two groups have very different needs, but they share a desire for comprehensive, bias-free financial planning tailored to them. Dias is comfortable and content in both arenas, serving all of his clients with the same passion, expertise and highly personal approach.

"I don't go in with a mindset that a certain investment vehicle or philosophy is right for everyone," Dias says. "If I did, I would risk getting caught up in a fog, oblivious to what clients really want. Every person I advise is programmed differently, and every investment plan should reflect that."

Priority One: Strategic Tax Planning

Dias' brand of wealth management encompasses every aspect of a client's financial life. His first order of business, however, is addressing a client's tax liability. As a member of a national association of tax professionals, Dias confers with accountants from across the U.S. to keep pace with changing tax laws and strategies.

"When I meet someone for the first time, I look closely at their tax returns," he says. "Within a minute, I can identify harm that's being done to investments and suggest strategies such as charitable trusts that will immediately reduce taxes. I think clients really appreciate this approach, because few other financial advisors bring this kind of knowledge to the table."

Engaging Clients on Their Terms

With a strong academic background and interest in psychology, Dias places a high premium on knowing his clients on a deeper level—not just what defines them on paper, but who they are at their core. He encourages new clients to take a brief personality test so he'll know what they *really* expect from their advisor and can cater to their unique engagement style.

"The chemistry I have with my clients is critically important to the success of our relationship," Dias says. "It's important for me to understand their preferences, personalities and expectations so I can meet them where they are."

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