Feature Interview With Tim Maurer

Every day, we work tirelessly to deliver on our promise to be a destination of ideas, insights and intelligence that helps investors make better decisions about their futures. To that aim, we're thrilled to announce that nationally known advisor, author and speaker Tim Maurer has joined our team as Director of Personal Finance. He will continue his day-to-day work advising clients at Buckingham as well as contributing to our community as a national thought leader through his writing, speaking and media appearances.

Tim learned about the BAM ALLIANCE first by reputation. "As the BAM ALLIANCE grew, the movement of advisors and investors flocking to it combined with the experienced and respected voices representing it in our field became impossible to ignore," he says.

Because of his friendship with Carl Richards, when Carl joined the BAM ALLIANCE, Tim saw firsthand how empowering collaboration can be when so many voices are unified behind such a life-changing philosophy. "Carl and I both have a crazy passion for finding a compelling way to help people see important ideas in a new way. Getting the opportunity to do that with Carl and now Larry Swedroe, Dan Solin, Jared Kizer, Jim Whiddon and others in the BAM ALLIANCE is a dream come true. It's the perfect mix of mission and muscle."

Tim will be a regular contributor to the BAM ALLIANCE, creating content specifically designed to help advisors inform and educate their clients. Throughout the year, Tim will also be available as an event speaker for member firms of the BAM ALLIANCE.

Tim's written two books, including *The Ultimate Financial Plan: Balancing Your Money and Life,* which he wrote with best-selling author Jim Stovall. He has been featured on CNBC and ABC's *Nightline*, on NPR programs *The Diane Rehm Show* and *Marketplace* as well as *in The Wall Street Journal*, *The Washington Post, The New York Times, Kiplinger's Personal Finance, U.S. News & World Report* and *Money* magazine, among others. He is an educator, a speaker, a CNBC contributor and writes weekly for Forbes.com all around one simple truth: Personal finance is more personal than it is finance.

This mantra is what drives Tim today, but it wasn't always so crystal clear. During his 16-year career in finance, he spent time in every major facet of our industry — brokerage, banking, insurance and ultimately, as a comprehensive financial planner and wealth advisor for an independent fee-only firm.

After graduating with a degree in finance from Towson University, Tim began working for a brokerage firm. "I started out in the back office — it wasn't a glamorous job — but I really did learn the inner workings of the brokerage business during that time," he says. "Then I became an equity trader and realized after a couple of years I wanted to get away from the institutional side of the business and take on an advisory role."

Tim left equities and ultimately landed at an independent Registered Investment Advisor firm. "I knew there had to be a better way — no matter where I worked, it seemed like the financial planning and wealth management I yearned to do was an ancillary part of the business plan — that the real thing that drove each business model was selling," he says.

After weathering the ups and downs of those industries, Tim had reached a tipping point. "I remember calling my wife from a conference full of people selling financial products. I told her nearly in tears that I thought I had to be in the wrong industry because things were not at all as I envisioned they would be." Not long after that experience, Tim finally found himself in the independent wealth management space — where he thrived for seven years.

Once in the groove, Tim felt compelled to share his experience with others. "I started teaching at my alma matter and found the textbooks terribly boring. Instead, I'd illustrate my lessons with stories from my own career and of folks I admired. I realized that communicating this way resonated with people, and my stories started to come together in the form of a book."

Blogging started out as a way to support the book, but Tim soon realized that there was an audience out there hungry for his message. "I believe that regardless of our income or net worth, it's our underlying values and goals that drive our behavior with money — and that ultimately determines our satisfaction in work and in life."

Tim was born and raised in Baltimore, where he currently lives with his wife Andrea and their two sons Kieran and Connor. He received his bachelor's degree in finance from Towson University, where he is currently an adjunct professor of financial planning.