

# *Client Focused*



*John Murnieks*

*John Murnieks' skill set in the world of high tech enabled him to make an ideal and seamless transition as an Edward Jones financial advisor.*

**J**ohn Murnieks was so impressed with the Edward Jones financial advisor who created a financial plan for his mother after his father passed away that he not only completely altered his career path in high tech and became a financial advisor, but he decided to do it with Edward Jones.

That speaks volumes, not only about Edward Jones, which has an impeccable reputation in the financial world, but also

about Murnieks and the confidence he has in himself to switch careers and continue to flourish in his profession – and to commit wholeheartedly to his wife and their two young children by leaving a flourishing career where he often travelled so he could remain home to be closer to his family and grow with his community.

“When my father passed away unexpectedly, it put a lot of strain and stress not only on my mom but the family too,” he

says. “We needed help.”

That’s when they found Edward Jones. The advisor “put together a solid financial plan and took away a lot of stress away from my mom and the family,” Murnieks says.

It was at that moment that Murnieks decided to change his career path and become a financial advisor.

“I was enamored with the idea of working with people and families financially and helping them get through a difficult time - - and helping them plan ahead so when

ly of advisors.

When Murnieks was researching all the financial companies in the marketplace, “Edward Jones really stood out as a company that fit my values and what I wanted to be,” he says. “It’s very family oriented and very client focused. Additionally, the firm really focuses on being part of the communities where we work. Most advisors live in the same communities where they work and take part in charitable organizations, Chambers of Commerce, Rotary, etc. And on a national level, we do things like becoming a major partner with the Alzheimer’s Association. I participate

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those unexpected things happen, you’re better prepared financially and for retirement.”

He was sold on the idea in “having a trusted partner in a financial advisor who could steer you through the mess and uncertainty of unexpected occurrences and through life in general to get you to retirement,” he says. “The advisor we worked with really helped to calm things down. She took the emotion out of a very difficult situation.”

Murnieks clearly visualized himself doing the same thing – and the change could not have worked out better – especially in being part of the unique Edward Jones fami-

in the Orange County Alzheimer’s Walk.

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**M**urnieks’ 18 years with one of the largest global technology companies paved the way for his new prosperous career. His roles ranged from project management, Technology Manager for Software Vendors to Business Development Leader for Cloud and Big Data Analytics. The skills are highly transferable – and it has made him a better advisor because of it.

“As a project manager, a relationship

manager and a customer success manager, you need to know what's important to your clients," he says. "It's not about what you're trying to sell them. It's about listening to what's important to them and understanding what problems they are trying to solve."

"Whether you're in the tech world or sitting down with someone and putting together a retirement plan, you need to listen. That's been one of the biggest factors in my success and in my clients' success. I have learned not to come in with a preconceived idea of what is going to be the solution because it's always different than what you think when you walked in the door."

His experience in project planning, setting milestones and coming up with contingency plans has been invaluable as a financial advisor specializing in retirement planning both for individuals as well as business, which is another focus of his practice.

"I really love to work with businesses on their plans," he says. "Many times owners don't know all the options that are available to them, both when saving for their own retirement but also providing options for their employees. With hiring and the retention of top employees being so competitive, a solid retirement plan is a competitive advantage.

"Planning and saving for retirement is a long-term project," he adds. "We have a goal – and we have certain constraints around that goal. Those constraints might be income, expenses, savings or social security. That's the universe we work with and we use the tools at our disposal to build a plan to get to where you want to be."

Murnieks is different than other advisors because "first and foremost I'm going to take the time to get to know and understand what's important to you," he says. "I

have a proven, established process of how we partner together. In order for me to provide suitable recommendations, I have to understand your risk tolerance, your goals, and your time horizon. I don't take a 'cookie-cutter' approach to my clients."

Murnieks pauses for a moment and ponders the next question. "The difference with me is that I work very deeply with my clients," he says. "I'm not an 800 number. When you have a question about your account or investments, I am the one you call or the one you see face to face in my office.

"I know your history and why we have made the choices we have. You just don't get that level of service with many of the other firms, where if you do get to talk to a person, they don't necessarily know anything about you personally.

"Additionally, I have the support of a team of expert analysts at the home office that looks at the entire universe of potential investments and they filter down to quality, long term investments. I'm not calling my clients and saying, 'I have a hot stock you need to buy.' No. We're the opposite. We're all about long-term strategy and partnering for life." — **By Rick Weinberg, California Business Journal**

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**John Murnieks  
Financial Advisor**

**Edward Jones  
25909 Pala Suite 315  
Mission Viejo, CA 92691  
(949) 457-0322**

**[www.edwardjones.com](http://www.edwardjones.com)**

**[John.Murnieks@edwardjones.com](mailto:John.Murnieks@edwardjones.com)  
[www.edwardjones.com/john-murnieks](http://www.edwardjones.com/john-murnieks)  
[www.facebook.com/ejadvisorjohnmurnieks/](https://www.facebook.com/ejadvisorjohnmurnieks/)**