

Ep#194: Leaving a Partner Position to Relocate and Start Over with Bryan Hasling



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Full Episode Transcript

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Caleb Brown

[*New Planner Podcast*](#) with Caleb Brown

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Welcome to the *New Planner Podcast*, where it's all about helping you successfully enter the financial planning profession and accelerate your financial planning career.

This podcast will help you understand the profession, become familiar with the various career paths available to you, and avoid the mistakes that limit your success.

Join your host, Caleb Brown, to explore the human side of creating a successful planning career through interviews, personal experience, and insights from the trenches.

Let's get started.

Caleb Brown: Welcome to the 194th episode of the New Planner Podcast. This is Caleb Brown, your host. My guest today is Bryan Hasling, who is a financial planner at Modern Financial Planning. Bryan was a guest on the very first episode of the New Planner Podcast and joined the show recently to give us an update on his last four years, starting with a recap of how he got started in the profession, his first role in joining a sole practitioner firm in California, then journey to becoming a partner in a much larger RIA that they ended up merging with and how life then brought him back home to Texas.

Stay tuned in the middle where he discusses what options he considered for his next step, why he ultimately joined an established firm where he could build his own book and not have to create everything from scratch. He goes on to share his growth metrics after year one in his new firm, such as how many clients he has acquired, how he gets clients, What his target client is, how he charges, and what the fee split is for his share of the overhead. Check out the end too where he talks about what a great journey it has been for him and how long it takes to become a good financial planner, plus some tips for new financial planners. I hope you enjoy my interview with Bryan Hasling.

Hey, Bryan, welcome back to the New Planner Podcast.

Bryan Hasling: It's good to be back.

Caleb Brown: So me and the audience are just dying to know, what have you been up to the last four years? I mean, it was October is our very first episode on the New Planner Podcast, so I appreciate you and Yusuf coming on.

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That got us started and here we are almost four years later. So what has been going on in the last four years? That's a big one for you.

Bryan Hasling: Pride and joy being on episode number one of this podcast. I remember you were asking, "Hey, do you think we should keep going?" And it was so early, so you've kept it going for four years. So good for you. That was a turning point in my career at that point. I had just become partner at a major, you know, we'll call it a mid-level, but a pretty big firm. I mean, that firm is probably close to 1 billion dollars now.

I just became a junior partner, but you were even part of my story before that, which you helped me get placed into my first job, which was a big risk for me, moving from Texas to California. You made that happen, which pretty much made my career. So you've seen me at many stages of my career for sure.

Caleb Brown: Thanks. Thanks so much for coming on the show. We're going to end the episode, right? Just kidding. Hey, I appreciate you sharing that. That's really cool. Appreciate that.

Bryan Hasling: You definitely set me up, but the big thing there, why I even took that job is because there was an opportunity, but I also had good management. There was somebody that was going to be taking care of me. That's the thing that a lot of people need to be, we'll say sussing out. They need to be filtering for is not just the opportunity on paper, but also who are the people that are going to be managing you and sort of raising you.

So you got me in a good position there. I had really excellent world-class training and I got to learn how to do everything. So that was a good situation. That went on for, we'll call it six years or so. We built a very small firm up and then we've hit the point where we needed to merge into, we'll call it like just like a slightly larger firm.

So we merged in and with that merger, my position got basically parlayed into a junior equity slice of the business. Episode one kind of talks a lot about that kind of the mechanics, both Yusuf and I kind of share some of that stuff. But yeah, I bought into a firm and I was really just a senior-level person.

And so that was a good deal for me. That was out in California. I'm in Texas now, from Texas, but built my entire career out in California as a junior partner, I was really just—

Caleb Brown: Let me just go back for clarity. So you became a partner and you're only in the business about six years.

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Bryan Hasling: Yeah. Yeah. Six years. So right about age 30, I had just gotten married. It was like, all right. In my head, I was like, I've made it.

Caleb Brown: Yeah. So you merged into a bigger firm, had the equity, everything was looking great. And then?

Bryan Hasling: Yeah. So continue to build my skills just 'cause I was a junior partner, doesn't mean I was, I had a lot to learn still.

So built my way up there, got better at working with clients, built my skills up to where I felt pretty confident in my skill set. There was even talks of me potentially having a roadmap to becoming a larger partner over time. I think it's pretty standard. You kinda like do it in tranches per se. About 2023 comes rolling along, maybe even before that, my wife and I, we're both from Texas.

We were both working out in California and we just basically decided, I think we're ready to start a family. As soon as we made that decision, everything changed. It was almost immediate. Your life can now start to see many years out into the future when maybe we were just kind of living like 12 months in advance.

Now we can see a little bit further and we just couldn't picture living in California anymore if we wanted to raise the family the way that we wanted to just because mainly our family and everything is in Texas. So we knew that we wanted to come back to Texas. The big question just became, well, what's going to happen with work?

I say that because the firm that I was with, you know, most of these firms that we work with, Boutique RIA, I mean, it doesn't take many people to service a really, really great business. We were only like 9 or 10 people large all in one single office. So part of the discussions that started with the firm is if I did stay with the firm, I would be the one person that's kind of like out there by myself.

You can call it remote. I like to refer to it as like building the Texas branch, call it whatever you want, but I would be the lone ranger out in Texas, which would have been a risk in itself.

Caleb Brown: Yeah. It's like opening the Texas office, which I mean, now looking back on this, it's like well, I mean, maybe he's not too far-fetched because just look at the news stories and where all the people moving from California,

Bryan Hasling: The storyline seemed pretty smooth in my head, but actually getting a full, set of partners on board for that decision. It's a big deal. It's it would be the first time

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ever doing this. I'm still a very, very junior partner. There's a big difference between being a 1% owner versus a 30-something percent owner.

Let's call it what it is. So I was still relatively just a senior employee and it'd be a very big risk on their part to do it. So we ended up deciding that it could actually work. We got to the point where we had some conversations. Yeah, this could totally work. And so it actually came down to me of what I wanted to do.

And I saw where my career was. I saw the next stage of life. I want to be a very involved father. I had been doing my thing for a while. I kind of got good at the job. And if you have any entrepreneurial itch at all, you're always trying to decide, like, when is that point? Is it now? Is it in five years when I have more money?

So it's it's all the things that we talk to clients about actually, whenever they're starting to talk about, do I want to be an entrepreneur? Folks that I work with in technology, they're like, "I kind of want to go work at a startup. I want to go build my own startup." It's the same equation. So I got to do it to myself really.

The big things were, do we have enough runway? how much money in the bank? This is all financial planning stuff that we know. Do we have money in the bank? I have a luxury that a lot of people don't have, which is like my spouse has an income that meets or exceeds what we think our run rate's going to be over, at least before we have a kid, and then things are going to get crazy, which I do have a kid on the way, by the way. So that's happening very soon. So, we did all this math basically, and we're like, well, let's think about it as a calculated risk. If you were going to try and do something on your own, build your own practice just to see if you got it like the way that you think that you got it, Bryan.

This might be the time to do it and we can afford to try this out for the next two to three years. If it doesn't work out or it's not meeting what we need from an income standpoint, what better resume booster to go talk to other firms with than, you know, you or the person doing it on your own? So I feel like going into another firm is always going to be there for me, but happy to talk about that decision more.

Caleb Brown: It looked like they were open to you moving to Texas and doing the virtual thing, but you were saying like, "I have the entrepreneurial niche. So I think I want to just do my own thing," is what I heard.

Bryan Hasling: That's basically what it came down to. Maybe I was overly cautious about the relationship side.

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These people very much cared about me. I care about them. There's no malice either way, but you know, I could certainly see how hard it was going to be to kind of keep the same relationship going. And I was like, I want to keep becoming a larger and larger, larger partner. How am I going to be this one guy that's over here and still have influence over the firm?

It just wasn't adding up to me. I think it could have worked for a good bit of time, but I basically, I don't know, you could say I sold the stock high, but maybe it was premature. I'm not sure, but that was the decision I made.

Caleb Brown: Okay. So you really just felt the pull to get back. We want to get out of California. We got to be around family and we want to get back to Texas. So did you start your own or did you join another firm and you've started your own firm underneath? Just walk us through the structure on the new organization.

Bryan Hasling: Yeah. So the current setup, it's my own practice underneath we'll call a larger umbrella, but for all intents and purposes, it's certainly my own practice. I get asked a lot like why did you go that route as opposed to just full-on solo-solo. I'm always like deciding, that's always like the backup plan B like in my back pocket and I'm always sizing up the current arrangement with that. There's trade-offs in doing either route. Going full solo-solo, I knew that I had to go through registration and maybe wait some time. I had a few family and friends accounts that I wanted to basically take with me immediately. Every other client from the firm needed to stay in place, but you know, like close family and friends, they were going to come with me no matter what.

And I wanted them to have a home with me as soon as possible. That was one side of it. From the other side of it, I wanted to hit the ground running and start letting the world know what I was doing, start having conversations. I didn't want to really waste my time, spend time building a website, working on SEO and lead flow.

I didn't want to worry about compliance. You can get really lost in the weeds and have a full day's full week's worth of work, and you haven't actually talked to any outbound sort of like prospective clients at all. As I'm seeing about a year in, it takes a long time to get the word out about yourself.

And it's happened slowly and gradually. And then you hit these inflection points where all of a sudden people start calling you, but you know, that was the trade I made. I wanted to get started right away. Also, instead of just joining some larger like organization where I could plug into, if I was going to plug into anybody, I was going to plug into a system where the current website kind of matched what I was going for anyways.

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And I was fortunate enough to have a friend who I've known for a long time, we were kind of volunteered together on FBA and such. He had left a larger firm too and started his own practice five or six years ago and built it from the ground up. I looked at his client profiles, at least his niche down service, which was really just tech professionals in the Bay Area, which also happens to be the type of clients that I consider to be my bread and butter as well. We just happened to live in the Bay Area. It kind of made sense. So I was like, well, we just decided why not be redundant? Maybe just try this out.

Caleb Brown: Got it. Okay. The pros and cons, you listed those out. I mean, getting registered, getting all set up, figuring out what technology and all that stuff and your website.

I'm totally with you. I mean, that's one of the downsides about hanging in the shingle. I talked to people all the time. I was like, "Well, do you get any clients? Are you like..." well, or they call me like, "Well, I'm not getting clients." "Well, what have you been doing?" Well, I've been in my MoneyGuidePro software, really adjusting the assumptions. That's what I've been doing." That is going to get you nowhere. Like you feel good about that? It's like no, you got to get somebody to talk to. So it sounded like you bolted on to somebody under a bigger, your words, bigger umbrella, but it's actually a small firm. Right? How many people are there right now?

Bryan Hasling: It's really just my partner, Mike, myself as the only lead advisors. And now we have one operations person and that's it.

Caleb Brown: But you guys have siloed practices. You're not working on—

Bryan Hasling: Yeah. We'll call this the siloed model.

Caleb Brown: Yeah. Like a, maybe a glorified silo or something. Yeah. I mean, so you're not, there's no salary or anything. It's all what you generate, right? That's the way the financials work.

Bryan Hasling: Yeah, on paper, it's basically like I am running my own practice from the ground up.

Caleb Brown: There's a lot to unpack there, but let's go back to something you said earlier. You said, "Hey, I have a wife who has an income that's either meets or exceeds sort of what we need."

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What would you tell the people out there? They're like, "Bryan, love it, want to pull the trigger, got to scratch this itch, but I don't have a spouse that's employed or I don't even have a spouse. I've got no other money." What would you tell that person?

Bryan Hasling: Yeah, I mean if you're married, you guys are in a partnership and you guys have to agree and feel good about what you're doing.

If those spouses are not involved, this is not the money side, this is like the emotional, personal side. But if those spouses aren't on board, you're going to have a hard time really doing this and building this the right way. It just takes so long to really get traction and really start getting your footing.

So you guys have to be on board. From the money side, whether you have spousal income or not, it's sort of the same equation. You kind of know how much money you have in the bank. If you're a financial planner, you should probably know what your monthly burn rate is. You should probably know what large expenses you have on the next six to 12 months. It's all basic financial planning stuff. You just have to do it for yourself, which can be a little funny.

Caleb Brown: Well, give us some insight and I appreciate that. Give us some insight into this. I mean, you're a partner at a firm, you're making a good income and you decide, "I'm leaving all that and I'm going to start my own so my income is going to probably zero or close to zero."

It's a lot less than you were making. And, "Oh yeah, now my wife and I are, we have a kid on the way." Just talk to us about how scary that decision was. I mean, maybe it wasn't scary to you. It'd be scary to me. I'd be freaking out, but just walk us through that. The emotional side.

Bryan Hasling: Yeah. I mean, we fully prepared to do this leap into the new practice and have a kid on the horizon. That was the whole like planned together. So that's the new math, I guess. You can start to do math on well, what are daycare costs whenever that time comes? That just makes your burn rate bigger. On the personal, emotional side, I mean, the most important thing is I am constantly checking with her.

I'm just like, "Hey, are you still feeling good about this?" Like more so sanity checking myself. Her response dictates honestly how I'm going to feel the next day plugging in. If she starts to feel any concern at all and starts to show any sort of fear, it's most likely going to affect how I show up.

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I'm going to start, maybe taking on smaller work or work that's out of like my bread and butter just to get revenue in the door and you're starting to play shorter term games whenever this first year or two needs to be setting up for long run. Bigger sort, not home runs, but you kind of get what I'm saying, but I haven't had any stress or pressure from her.

I'm constantly maybe over checking, maybe just because my love language is words of affirmation. But I'm constantly checking in with her, but yeah, if she has any sort of pressure or fear, it's going to influence me at home for sure. And that has nothing to do with money. It just has everything to do with us and our temperaments towards us.

Caleb Brown: And I want to go back to something you said earlier. You said it takes so long to get traction and get this up and going. And I know Alan and Michael on the XYPN podcast have talked about this before, but I want the listeners to understand when you start a business from scratch, it takes a while. I had a career changer that we talked to this week and he's like, "Hey, I tried doing this on the side and I did a couple seminars and I didn't get any clients. And so I had to shut it down." I'd be like, "You're trying to have your cake and eat it too, man. You can't keep the fa—I mean, you got to kind of go all in on this." Right? I mean, and it's going to take probably three years. So maybe just walk us through your, you've been at it, what, a little over a year now?

Bryan Hasling: I just did one year. So I know what that one year looks like. And my one year is different than a lot of people's one years because I've been doing this for a decade. And I was a partner at a firm that knows what they're doing.

And I was a partner at a firm where I think my last year with them, I maybe brought on, signed up all on me, maybe 10 million dollars of assets in our management, which is ironic because pretty much everybody I talked to, whenever they're like thinking about this, they're just like, you know what? Everybody can do math. If you work at a larger firm, like you see the invoices, you see what clients are being charged and you see what you're getting paid. And so everybody does this thing where you're just like, "Oh man, I could just do this on my own." Everybody always says, "All I have to do is get 10 million dollars. If I just get 10 million of AUM, I'm going to be set."

And I'm sitting here telling you that I was doing that at my prior larger outfit. But as soon as you go to your own thing and you are now an unknown character all of a sudden even though you have years of experience, those 4 million-dollar prospects aren't calling me as much. Wouldn't you know it? I have to find like where's my space going to be? What's a large client for me, but not too small to where I'm kind of wasting my time.

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And that's the hard part for a lot of people. I'm a year in, I've got maybe under a dozen clients, and a lot of that is kind of lucky timing, I would say. The systems for marketing probably still aren't where they need to be to become like a repeatable cycle.

So going into year two, it's just as much of a puzzle and a game as it was in year one. But fortunately, I am where I wanted to be, if not further along. But you know, there was a couple of lucky bricks here and there.

Caleb Brown: And is that your goal going forward? I mean, on business development, just for kind of, just give some people some context. I mean, a client a month. Is that what you're shooting for?

Bryan Hasling: That was like my high goal before, which is kind of what I've landed at before. If I get a client a month, I'm ecstatic. You're going to fill up soon enough, three or four years and you're like pretty busy at that point. So a client a month is great, maybe every other month is probably fine too. But as long as you've got like leads that you're like sort of nurturing over time like it's okay. I'm not so much worried about the actual signups, but as long as I have five or six people I'm talking to softly over any given time like that's good enough positive activity.

Caleb Brown: And what's the revenue model? How are you generating the revenue? What are they paying?

Bryan Hasling: What's the fee to the clients?

Caleb Brown: Yeah. Like I sign up, what do I get and how much is it going to cost?

Bryan Hasling: Gotcha. Yeah. We are primarily assets in our management base with what I'll call like a floor or a minimum fee. Minimum fee for clients is 1,500 a quarter, so that's 6k a year.

If you look at our AUM fee schedule, that basically equates to like a 500k assets under management client. 1,500 a quarter works for some of our target demographics because a lot of times they may have maybe illiquid stock or some sort of concentration. They need a lot of, they have a lot of planning needs.

They have complexity going on. Maybe they're going to have a liquidity event from their startup in 9, 12 months or something like that, but they need help and foundation work today. So the 1,500 a quarter is like the consulting fee. And then eventually it just morphs into a kind of a standard assets under management fee.

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Caleb Brown: Gotcha. Okay. I'm with you. How are you getting these people? I mean, I know you said a lot of your, you started your career in California, now you moved back to Texas. I mean, you can get clients anywhere, but I mean, I know you're active on LinkedIn and you're putting out a lot of content and you have a presence there, but everybody has a presence there. Everybody knows the algorithm. So how are you differentiating yourself?

Bryan Hasling: Yeah. I'd say I kind of have a barbell approach going on. On one end, you're always going to kind of have the friends and family thing. Assuming that your friends and family like you and trust you. So we've got friends and family stuff, that's kind of always going to be there.

You can kind of niche down all you want on whatever sector, but you know, if your aunt calls you because they need help, and you like helping out your family, like you're probably going to take that call. On the niche, like actual focus side, like I said, our focus is really on probably median age, 45 years old, dual income worker, primarily in technology, maybe they're in startups, maybe they're just a large Google or Meta.

Those folks, we have the luxury of having a pretty hyper-targeted website. The luxury that I have that a lot of people don't have is that I'm doing this with a friend of mine who happens to have a pretty full like business already. And the website is working. And when people come to the website and want to talk to somebody, if he's full, well, maybe they're going to talk to Bryan on that one.

So I have this huge luxury that a lot of people don't have. I was able to plug into a system that has SEO kind of working. It has local, you know, our firm still headquartered technically in the Bay area. And so we're getting those people that are calling us. So I have quite a bit of California folks that I talk to every single day.

Building the Texas, all my marketing and talking to people, it's actually to try and see if the same like synergies could be like done in Texas as well. There is technology and young families making a lot of money and doing well that need our services. I feel like I'm pretty well positioned to do a pretty good job and help those people out as well.

But you know, just because I'm from Texas doesn't mean that, you know, I feel like I'm like new to town. I feel like I'm like starting over.

Caleb Brown: I appreciate you addressing sort of, one of the questions I had was if the lead comes in the website, who gets it? Is it you or Mike? And what if Mike's not full? You touched on that a little bit, but what if Mike's not full? Who talks to them?

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Bryan Hasling: Yeah, it's not an exact science that we have down right now. We fully understand that priority number one is making sure that I've got like a base foundation. So I'm sure a little bit of priorities' going to me. At the same time, he would like to grow and he would like to add to his base and feed his family a little bit more. So we'll try and figure out a system. The only reason that our arrangement works is that we know, trust, and respect each other. If we didn't, this could get ugly pretty fast. And so we trust each other.

Caleb Brown: And then what's the arrangement with him? Is there some sort of percentage or some sort of monthly expense to, for all this other stuff that you're not having to do yourself?

Bryan Hasling: Exactly. Yeah. Yeah. So like in the solo world, if you go solo-solo, every cost comes out of your pocket. If you want to pay for a fancy website, if you want to buy all the software, pay for a compliance consultant, pay the xyp and monthly dues like that all comes from your pocket and you're already starting in the red, so to speak.

In my arrangements, I'm effectively financing it on the back end where I didn't pay anything to get started. But as revenue comes in, you're basically paying the house a cut of it. We have an agreement in place of like how to pay the house effectively. But yeah, that's how the house gets paid.

Caleb Brown: Roughly, what are you having to give up?

Bryan Hasling: it kind of depends on like lead source and like all this other stuff, but anywhere from like 40% down to 30%. Sometimes lower depending on what's going on, so this is kind of what people say like payout grid or some sort of payout rate. So my cut, everyone's trying to figure out what am I going to get to keep.

So the numbers that I just said, anywhere from 60, maybe 75% just kind of depending on what the lead source is and all that. Which I would say is actually quite high by the way. So that's why I almost hesitate to tell people because you go to a Merrill Lynch or something like that, it's not that high.

Caleb Brown: I touched on that in my book on chapter two or one of the earlier chapters about just the payout percentages on some of this stuff, especially from the insurance and the wirehouse and they are a lot lower than that. They're terrible, essentially.

Bryan Hasling: 40 percent or so. So, yeah, I mean, it only works because we're a pretty lean, mean machine.

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We don't have any physical offices. I pay for some of my own stuff myself, but you know, I think it's a generous payout relative to those industry standards, but it comes at a cost too, right? Like I'm not getting a ton of support in other ways. I'm doing a lot of it myself. So trade-offs.

Caleb Brown: So somebody that doesn't have a firm with a buddy they can sort of bolt on to, and they have to go solos. What's your number one suggestion for them on getting traction with getting paying clients.

Bryan Hasling: Yeah. I was even talking to somebody this week about it who's contemplating the exact same things. They're like, they do the same thing.

“Oh, all I have to do is get 10 million and I'm good to go, right?” And I have to say the same things like when you leave a larger firm, the people that are gonna be calling you might be a different kind of person. It all comes down to imagine you running a business by yourself. How many people are going to be calling you? How many people are going to be signing up for you? And that's sort of the magic question. I think it certainly helps to have some sort of like base or foundation. I had a little bit with friends and family and maybe friends and family that were even like on the cusp and when I like went solo or when I went and started my own thing, like they want to support you, right?

Like your early people, you got to have those early people because they're going to be the ones that want you to succeed because they don't want to be the only people on the island, so to speak. It sure helps a lot to have some early feeder money.

Caleb Brown: Oh man. Bryan, cool stuff, man. What a journey. I mean, you've had a lot in the last four years, man, kudos and a lot of big decisions. It looks like it's working out really well for you. And man, I'm just excited for you about what's happening, what you're doing. And you seem just in a good spot, very enthusiastic, excited, very happy. And I don't know, maybe that's just because you're about to be a dad and not necessarily the business side, but that's okay.

But really you and your spouse really just being intentional, designing. And this is what I see with the next year, we're gonna design our career for our family, for the other stuff, and that's not the way it has always been. So it's really, really neat. Any final comments or tips or anything you'd like to leave the new planner audience with?

Bryan Hasling: It's been a fun ride. I feel like I've really started over in many respects. There's a whole new set of like finding yourself that needs to happen at this stage. I did that 10 years ago when you helped me get placed in my first gig. I had to find out what I was trying to do. Playing that game of working your way up in a firm and getting good at this job, it took a decade.

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I think people don't realize how long it takes to get good at this job. I think you take for granted how hard this job is sometimes. We're talking about dealing with people and their money and they're talking about things that they've maybe never talked out loud about and then you have to charge them money for it and this is not a cheap service by any means.

This is a premium service. Let's call it what it is. It's a hard thing across the board just to do the job and then to be able to talk like, this is how much I charge and be fully confident about that and have a very comfortable conversation with somebody. And now in the new world, being able to do that over Zoom, maybe you're a couple of states away from people. It's really hard. It's really hard to do. This job is so hard to do. I talked to a lot of people that are maybe like trying to jump in and they want to get started and start their own firm immediately. And maybe just because I did it the hard way, the long way, maybe that's what it is, but it just took me all that time to get really, really good.

It took me like eight years to feel like, all right, I'm really good at this job finally. It took me so long.

Caleb Brown: Bryan, thanks so much for coming on the show and sharing your story.

Bryan Hasling: Happy to be here.

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Tune back in next week for another episode, and until then, we are here to help you succeed.