

INTEGRATED EQUITY MANAGEMENT

IEM Employee Feature – Melissa Costley

Balancing Work and Home Life While Leading by Example: First DO, Then TEACH

When I first joined the financial services industry nearly 10 years ago, I never imagined or sought out becoming a financial advisor. At that time, I didn't feel like I was an ideal steward in offering financial advice to others because, quite honestly, I wasn't confident in my own personal financial situation.

After marrying my husband, Steve, almost 7 years ago, we started working with a financial advisor at the firm I worked at previously before joining IEM. I was proud of my husband and I, working as a team, to tackle our finances together. Just like a lot of newly married couples, that time in our lives had a lot of moving parts (changes in our careers, buying our first home, and starting a family). It wasn't until only a few years ago that we finally tipped the scale in a positive direction and gained traction in our financial lives. The security we feel going forward has been a gift – helping put our minds at ease, and now we are setup on a good path to our version of success.

It was 4 years ago this month that our CEO, Cammy, discovered me. Having a little bit of blind faith, I posted my resume on the Financial Planning Association of Minnesota website looking for a new opportunity that would recognize my determination to build on my career aspirations. Since being hired, I've worked harder than ever in my career and finances and I'm so grateful for the mentorship, collaboration, and reception I've received from all of my colleagues at IEM. Through the family and community mentality at our firm, I feel excited to be a part of a team that emphasizes paying it forward to others.

Being a mother of two young girls, Hailey (3), and Addy who will be 5 years old this month, let's just say home life can get pretty hectic! With children in daycare, and a husband whose job as an airline pilot has him traveling a lot, there's no doubt we've faced some challenges in our everyday life. It's always a balancing act being a mother and wife in any industry, but I'm incredibly grateful to work at a place like IEM that allows my family and I flexibility to make things easier for us day-to-day and understands new realities for parenting and marriage in today's modern life.

When it comes to my professional career, I've always needed an environment where I can thrive, grow, and develop my skills. IEM has cultivated a team approach and promotes autonomy of work, and that allows all of us to feel engaged and stay motivated for our clients. This inspires me and helps me realize that one little piece of advice I give can turn someone's life around for the better.

One thing this pandemic has shown me, and I think a lot of other people, is to re-evaluate work/life balance. Having the gift of flexibility has allowed me to blossom and catapult my career into a leadership position as Director of Client Strategy, Associate Private Wealth Manager at IEM. Sincerely, IEM is a place I want to be a part of forever, and I wouldn't have recruited my identical twin sister if I felt otherwise!

Melissa Costley

Director of Client Strategy, Associate Private Wealth Manager