



NATASHA PALMATIER

SMALL BUSINESS SPOTLIGHT: 8 QUESTIONS WITH NATASHA PALMATIER, FINANCIAL ADVISOR, EDWARD JONES

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What inspired you to start your own business?

My dad started his own business when we were young. He had the flexibility of creating his own schedule and making sure he played an active part in my life. He was also present at important milestones in my life and even coached my soccer and basketball teams. Now that I have a family of my own I understand how important that is and I am grateful that my business allows me to make my family a priority.

What inspires your work and what sets you apart from everyone else?

Throughout my childhood many of the important people in my life were amazing women; family, friends, and teachers, Some of them didn't participate in family financial matters because they were too afraid to ask or because they didn't have the knowledge. As I grew up I saw how this could adversely affect their confidence and/or put strain on their marriages when making important financial decisions. So, I wanted to make a difference in my career by empowering women to make informative financial decisions by educating them on all their options. In doing so, I feel I make a great impact on the women in our community and teach my daughters to be strong independent women.

What is your background and how did you develop the skills to start your business?

I graduated from the University of Iowa with a bachelor's degree in finance and then attended an international business school in Italy. To become a licensed financial advisor, I passed the required exams -- first the Series 7 and then the Series 66. I passed the exam to receive the special designation of Accredited Asset Management Specialist® (AAMS®). Currently, I'm studying for the exam to earn CFP® designation. Additionally, each license and designation requires its own updated training and periodic testing to stay up-to-date, ensure compliance with all regulations, and to continue to be licensed.



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What has been your biggest challenge?

Being a woman in a business historically dominated by men is challenging. Being female and young, especially when just starting out, is even more difficult. Assumptions about my abilities have been made based on one or both of those two identifiers before meeting me or having a conversation. All I ask is that I'm given an hour of their time, face-to-face, to learn what's most important to them. Fortunately more often than not, they do come realize that I have the knowledge and determination to help them achieve their financial goals and I make the right recommendations for their needs. They learn just how passionate I am about working in partnership with them and that I'll be here to do the same with their children and even their grandchildren.

What has been your biggest success to date?

I'm proud to have built a profitable business from the ground up after moving here to this beautiful community 7 years ago without knowing many people and while raising two wonderful girls.

I have been honored with two coveted Edward Jones awards - The Ted Jones Prospecting Award, recognizing a select number of first-year financial advisors who achieve success; and the Ted Jones Entrepreneurial Achievement Award, honoring financial advisors who build strong client relationships.

Describe your typical work day.

First thing in the morning, I make time to reach out to clients by phone -- sometimes it's something as simple as wishing a heartfelt happy birthday while other calls may be to ask-and-answer questions about market dynamics. To ensure some consistency throughout the day, specific times are set aside for face-to-face appointments with clients and prospective clients.



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Which small businesses are you inspired by?

Edward Jones has a strong culture of supporting women in business. With that comes the opportunity to work with and be inspired by many financial advisors, who happen to be women, who support each other and who've had great success in growing their businesses. Peggy Klein, CFP®, Financial Advisor, is one of those outstanding women. A mom, a wife, and a successful small business woman, she's been with Edward Jones for more than thirty years. Peggy and I worked together, recently, when she was assigned to be my coach and mentor. I learned so much! She's empowered me with fresh ideas to build and manage my business while continuing to balance career and family. Peggy's support has been unwavering and she's truly an inspiration.

If you could go back to the beginning knowing what you know now, what would you have done differently?

My business is all about meeting people and building solid relationships. While I've been successful in doing so, looking back, I would have more quickly and fully immersed myself into the community. With so much to love and enjoy about the Cave Creek/North Scottsdale area and the numerous opportunities to be actively involved, I would have connected with and, today, be helping more individuals and small business owners achieve their financial goals.

What's your best advice for someone who wants to start her own creative business?

If you have a passion for creativity, find a way to make it work for you and go for it! I mean really go for it and don't have a, "Plan B." I'm not saying it will be easy or quick but you know the saying, "Nothing worth having comes easy." People will tell you it's too risky and try to talk you out of your plan. Keep moving forward. Be fierce. Be Intentional. Be focused. Learn from others and don't quit. Not only will you achieve success, you'll be happier in the long run.

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