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TAMPA BAY Business Journal

Friday, June 8, 2007



BRAD WELCH
Financial Advisor
Branch Manager, RJFS

Brad Welch: CEO moved his way into business

Tampa Bay Business Journal

WHO AM I?

NAME: Brad Welch

TITLE AND COMPANY: President, CEO, **Welch Financial Inc.**, an independent firm. Securities offered through Raymond James Financial Services, Inc. Member FINRA ISIPE

YEARS WITH THE COMPANY: 12

YEARS IN TAMPA BAY AREA: 46

NATURE OF BUSINESS: Financial planning and money management for high net worth business owners and executives. \$500k minimum account size.

EDUCATION: Duke, Wharton

WHERE YOU GREW UP AND WHAT IT WAS LIKE: St. Petersburg. I attended NE High School. St. Pete has always been a nice low-key friendly southern town to do business.

Tips of the trade

Welch Financial

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How do you organize your workday? Sundays are family or free days; Mondays and Fridays are buffer days for research, staff meetings, paperwork and planning. Tuesdays, Wednesdays, Thursdays, Saturdays are focus days for visiting with clients.

How do you manage the information flow? I surround myself with bright, energetic people and delegate the "stuff and messes" to them where they have unique abilities.

How do you keep yourself current in your field? I read everything I can get my hands on. I attend money management forums constantly. I enjoy learning and gaining insight from the experiences of other successful entrepreneurs.

Where is the best source for new ideas? Fellow business owners and RayJay research

How do you measure your own success? I measure success in two ways. Primarily I inquire as to whether what I'm doing is honoring God. Secondly I refocus on my belief that, "Happy wife equals a happy life." Sally and I have been together since Duke.

Who is a mentor and why? Tom James. In addition to all his business successes, Tom is one of my closest friends; he's loyal to the end. He's a renaissance man -- a well-rounded family man, husband, father and grandfather while at the same time internationally known as an art collector and tennis enthusiast.

Background check

What was your first paid job? Owning my own lawn mowing business in St. Pete, "Welch -- You grow it, I'll mow it." I learned early on that owning a business of one's own is not as glamorous as it seems and that to be successful requires self discipline, resilience and good old fashioned hard work. Consequently, as young as I was, I established a conservative mindset when it came to preserving wealth (even if it was \$20 a lawn!).

What did you want to be when you grew up? My dream was to be my own boss. I was always the organizer, leader and planner.

What is your favorite activity with your family? Cookouts and sports. It's a chance to be with the people I love most. Now that our boys are getting older and heading off to high school and college this bonding time is as important as ever as they head into different stages of their lives. It's a chance for Sally and me to leave work at the office and recharge our batteries.

If you could have dinner with one person you've never met, who would it be and why? Billy Graham or Tony Dungy. I like the way they live their lives to improve others.

Who are your heroes in the business world and why? Entrepreneurs because they make our communities a better place to live

What do you read for business and for pleasure? WSJ. I try to read a Pulitzer Prize every month. I am a firm believer that one never stops growing unless they chose to.

What keeps you awake at night? My wife has three Sphinxes (hairless cats) that never seem to sleep, which is ideal since I start my day at 4 a.m. and always have lots of four-legged friends around.

Words to the wise

What advice would you give to someone starting out in your field? Dream big dreams, write it down your goals and follow a detailed business plan.

How could Tampa Bay change to be more business friendly? Find out, get involved, and give back. People complain and say, "They should do something about that"? What people don't realize is that "they" is really them. The future of each and every community in this country is in the hands of its residents and business people. Get involved in our Community Foundation of Tampa Bay.