

Seeking-Nan.mp3

Intro [00:00:03] Seeking The Extraordinary™ is sponsored by The Colony Group, a national wealth and business management company that seeks the extraordinary by pursuing an unrelenting mission of providing clients with peace of mind and empowering their visions of tomorrow. To learn more about how The Colony Group manages Beyond Money, visit TheColonyGroup.com

Michael [00:00:29] Welcome fellow seekers of the extraordinary. Welcome to our shared quest. A quest not for a thing, but for an idea, a quest not for a place, but into deep, inner, unexplored regions of ourselves. A quest to understand how we can achieve our fullest potential by learning from others who have done or are doing exactly that. Extraordinary stories of overcoming anguish. Every single one of them had lost somebody from their family. I will never give up on trying to lessen that time. To people who have stood up to challenges with true courage. Do something in life. Did you have a passion for something that you enjoy and you find fulfilling? That's where you'll have the greatest success stories that will enlighten and inspire. What I said to them is absolutely a cliché, but the journey is more important than the end result. May we always have the courage and wisdom to learn from those who have something to teach? Join me now in seeking the extraordinary. I am Michael Nathanson, your chief for today's episode.

Dawn [00:01:31] Our chief seeker of the extraordinary Michael Nathanson has turned the mic over to me. I'm Dawn Doebler, a senior wealth advisor and principal at The Colony Group. Today's episode is sponsored by Her Wealth by Colony. Her Wealth empowers women with tools and resources needed to gain confidence and to take control of their wealth. An extraordinary woman at Colony is joining us today as we celebrate Women's History Month. Our guest today is a senior wealth advisor and principal at the Colony Group. Nan has had an extraordinary career path in her 24 years at Colony and how she got here as an impressive story. Please welcome the extraordinary Nan Vlad.

Nan [00:02:19] Thanks, Dawn. It's nice to be here with you.

Dawn [00:02:23] Well, Nan, you've been at The Colony Group now for 24 years. How did you get here? Did you always want to be in finance?

Nan [00:02:32] So finance never even crossed my mind. I wouldn't have known what a financial advisor was. I came from a family of doctors and nurses. What I did know was I didn't want to be a doctor or nurse. I was a pretty good player. Where I grew up in western New York and decided that I wanted to pursue a career in music or music education. And then I wound up at the conservatory in Boston, where I got a bachelor's degree in music and music, an in flute performance and a master's degree in flute performance. Two very useful degrees, but well.

Dawn [00:03:04] And certainly an interesting place to start and end up as a financial advisor. So tell us more about your time at the New England Conservatory of Music.

Nan [00:03:14] So and it was a great experience, like most college experiences for me, it was really a very challenging personally, I was a very painfully shy adolescents young adult, so. It seemed contrary to my whole personality to do something where you stand up in front of people and perform. But while that was nerve wracking, what it did. Teach me is a lot about myself, how I could deal with my stress, manage my stress, how to cope with a lot of constructive criticism when you're musician from not just your teacher, but the

orchestra, conductor and ensemble conductor and a group of people one on one. We did a lot of masterclasses. There would be complete strangers there who had comments. So you really I really had to learn how to take in that criticism, sort of filter out the feeling bad about it and moving forward to try to improve my playing and what I did. So personally. It was a really there was a lot of growth, I think, personally on my part. Besides all the other things that I think music is great for, you have to be very self-motivated. You learn a lot about history and culture and a lot of great stuff, but I think that was the personal growth that was really meaningful to me there.

Dawn [00:04:31] I think it's interesting to consider all of the things that you can learn in a career in music or the arts and how applicable it really is to the business world. I also imagine that there were a lot of key role models along the way for you both as you were going through high school and into the conservatory as well as shortly afterwards. So tell us a little bit more about some of the important people and mentors in your life that got you to where you are today.

Nan [00:04:57] Sure. First and foremost, were my parents. They were very supportive and really of anything I did. They taught me and my siblings always to really do our best at whatever we're going to do and to just work hard. And they taught us always to work hard and to always do the best we could. That's that's the most they could ask from us. So no unrealistic expectations. We all have limits. My mother always said, Someone's always going to be better than you, but somewhere you're always going to be better than someone else. So Michael would always say, strive for perfection. I don't know if we all reach for Certainly along the way, I've had teachers who were again, very supportive, demanding, but also supportive. So demand again, excellence, demand again, working hard, supportive when things don't work out quite the way that you thought they would. I also, after college, I got a job working for a sole practitioner at a law firm and this man is all also a partner at the called it hate group now. But we worked one on one for nearly ten years and he was really a very important mentor and influence on my life. One of the things I really learned from him was kind of the boss I wanted to be. If I ever had that opportunity, he really stood by and supported me. Whether there were some office politics or whether we did a lot of real estate closings. So they were fast and furious and sometimes stressful, and sometimes I would get caught in the fray. And he was always had my back. So that was very important to me. And at The Colony Group, the first person I worked for, one of our partners was a woman, and that's probably the first woman that I met who was in business and certainly the first woman I met who really was sort of in control of her own destiny, I guess. Single, working, a partner. Control is a lot of business. Someone to look up to. And then one of the other long term partners here, again, sort of from I mean, great adviser. I don't want to take that away from him, but from a personal standpoint to somebody who was always very willing to listen, provide advice, whether it was client related advice, business related advice, company related advice, or even sometimes just sitting and talking about sort of personally what's going on and providing support. So I think those are some of the most important people. And I don't I don't think I could do be here without any of them. They all played a different role, an important role in my life.

Dawn [00:07:30] So we were talking about the conservatory and then kind of branched over into starting your work in the in the legal field as well as at The Colony Group. I'm interested to know what was your motivation to shift from that career in the performing arts to corporate America? It was certainly a big shift. And so let's talk a little bit more about that.

Nan [00:07:48] My motivation was a paycheck, a regular paycheck. So like a lot of musicians or probably any artist, after formal education, I had a full time job and then practicing gigging, trying to take auditions. And what I also learned at school and after school is there are a lot of really, really good players in the world, and you don't need that many of them in an orchestra. So it's digging is the typical way of life. And I realized at some point that it just that was hard for me. I needed more security, more stability. And if I was going to work full time, I wanted it to be something that I could feel good about rather than just something that was keeping me busy during the day. I guess a lot of people had told me that law school was great. You could do so many things with a law degree and otherwise. My, my, my probably inclination would have been to go back into the sciences. That would have really meant starting over for me four years of undergrad and who knows what after that. And so I decided to go to law school and then I decided I would I should look for a job working at a law firm. During that year, I was applying. I actually thought it would be relatively easy, but people kept telling me I was overqualified because I had a master's degree, even though, you know, qualified me to do the kind of work I was doing. Kind of coincidentally, I found an ad in a local paper that no longer exists that that sent me to this attorney's office and as paralegal, met me at the door, said she loved the job, loved her boss, but her husband was being re station. I think he was in the Navy or something. And anyway, we had a lot in common and I got the job and that's kind of how I got there. And then. Fast forward like ten years and we had met two of the long term partners at the Colony Group, and we did a lot of real estate closings for their clients. And after one sort of two year refinance, boom, a one of those people came in to refinance her own mortgage and mentioned to my boss that they were looking for help at the Colony Group and they were going to hire. And he told her to talk to me that he didn't think I would be here long term one way or the other. So so I always laughed and said, My boss found me a new job. He handed me over to the Colony Group and that's how I got here. I really didn't know what I was doing or what I was getting into, and I'm not even sure that anyone would look at my resume today if I had applied for a job now, because, you know, everybody has the right education and the right background. It's a more it's an older and it's not old industry, but it's a more established industry. And that's how I got here. And when I got to the Colony group, there were I was the 12th person. So I've seen a lot of growth and a lot of change, but they were all great people. So it's been a really good place to be and to grow.

Dawn [00:10:36] And that was quite a change, certainly from where you started your career. Were your parents supportive, both of your career in music and then of your choice to make that significant change? Oh, they.

Nan [00:10:47] Were my parents. They would have supported me in anything that I wanted to do. I will say that my father, I think, was relieved when I told them I was going to go to law school. He was an refugee from Eastern Europe after World War Two, and he always talked about how it was important to him for us to be able to look after ourselves and be able to change, adapt to sort of deal with anything life threw at you. So for him, law school was definitely a more secure field. The music I would be able to financially look after myself, not have to rely on somebody else. So I think while they would have supported anything, he was very supportive that both my parents were so.

Dawn [00:11:28] And from that experience in your life, what advice would you give to others who might be looking to make a significant change in their career path?

Nan [00:11:37] Well, I don't know how much advice I feel like I have because I feel like I fell sort of from one thing to another. But I guess all the things we've been talking about, one, just willing to take a chance, even if you don't really know what you're getting into and

working hard, being willing to learn, being willing to sort of think outside the box. I think also finding people or having people who who you trust that are supportive that you can. Talk to that. You can bounce ideas off of that and just help help support you through those changes. I think that's very important as well.

Dawn [00:12:14] And how about do you have any regrets or anything that you would change?

Nan [00:12:18] Not really. The interesting thing is, as newer as thinking about this is that I remember my law school graduation, and at that particular moment I kind of felt like a failure because even after graduating from law school, I meant like music was in the past. But in the end, music gave me. And also I learned so much about myself. And I think without having gone through that experience, I would have been a different person. I would have been locked in the science lab and not forced to confront the world and people and and the Colony Group has given me a great place to be for the last 24 years of great people. That's what I really enjoyed about the place. I'm not. I like my work. I have wonderful clients, but the people that I see every day have been and it's been a great place to be. So I really don't regret. The way it happens.

Dawn [00:13:06] How about do you have a most satisfying accomplishment in your life so far that you can define?

Nan [00:13:12] So I would say from a career perspective, I think the most the most satisfying thing for me in the last 20 years, a couple of years ago, I was able to recommend or put someone forward for partnership with the company. And that was I felt like I was. It felt really good. It felt really good to have helped somebody get to that point. So I think being able to hopefully be the mentor for younger people that I've had being there to. Try to support their professional development, but also understanding because we've all been through it, the challenges that come with living life and and being there for many other people. I know that was probably the most that's I was really, really proud of him and it felt really good to be the person being able to have helped him get there or one of them. There are certainly several here. I really enjoy that part of the work.

Dawn [00:14:12] Well, it's been a great opportunity for me to get to know you. Nan, what a wonderful story. Who would have known that you would start out playing flute and end up here as a 24 year employee with the Colony Group and a partner of the firm and a wonderful mentor to so many others in the company. Do you have any final thoughts for us?

Nan [00:14:30] I don't think I do. It's at The Colony, it's been an extraordinary place to be. I think that it's it's been like a home to me. And I hope that others can find out, I don't know, find a joyful place to work, and, as Mike says, bring meaning and joy to to others.

Dawn [00:14:47] That's great. And that is the extraordinary Nan. Vlad. Thank you so much, Nan. And I'll end today's show with an important lesson that is clearly reflected in Nan's story. The importance of finding a mentor. From being a woman in a male dominated industry to changing career paths, I think we can all agree that mentorship, resilience and independence are what drove this extraordinary story. Nan's journey from a life in the performing arts to wealth management was driven by determination and independence, propelled by resilience and supported by strong mentor relationships all along the way, all emphasizing the value of never underestimating oneself and the responsibility to empower others by opening the same doors of opportunity that were

opened for us. Thank you again to our sponsor today. Her Wealth by Colony. To learn more, visit TheColonyGroup.com. You can also follow the Colony group on LinkedIn and on Twitter. Thank you for tuning in to today's episode in honor of Women's History Month, and thank you to Michael Nathanson for sharing the mic with me. I'm Dawn Doeblner and I look forward to joining you all again soon.