MEDIA KIT

J.D. Bruce

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ABACUS

BIOGRAPHY

J.D. Bruce, CPA

Chief of Growth

ABACUS WEALTH PARTNERS

My father was a hippie, so naturally I became a CPA. Being a hippie criminal defense attorney, my father fought 'the man' and defended the wrongly accused. He was a defender of the constitution and an enthusiastic revolutionary. He also didn't like following rules, like the tax code.

When I was eighteen, studying theater at the local community college, my father had an unfortunate misunderstanding with the IRS. We ended up losing our 4,000 square foot house by the beach and moving to a much smaller home where privacy was hard to find and secrets were difficult to keep. That's when I started to see through the cracks and learned about how your relationship to money can hurt you.

J.D. Bruce, CPA is the Chief of Innovation at Abacus Wealth Partners and is a leading voice on business operations, leadership and technology in the RIA world.

Having grown up channeling his artistic side into the theater, and then choosing the surprising path of accounting for a college major, J.D. quickly realized that being creative and artistic as an accountant wasn't as easy as he had hoped. In fact, many people consider creative accounting to be something you go to jail for.

With a career that took him from auditing pre-IPO internet companies, to jumping on the internet bandwagon right before the tech crash (oops), to consulting as a Controller and CFO, J.D.'s unique background and expertise turned him into an accidental systems and technology wizard.

Since becoming the President of Abacus in 2011 and Chief of Innovation in 2021, J.D. realized that the combination of business and financial advice presents tremendous opportunity for creativity and innovation as the firm designs and delivers new ways of bringing values-based financial advice to the world. Under his leadership, Abacus has grown to 65 employees, streamlined multiple technology and operational systems and is on track for revenue of $18 million in 2019.

As an industry expert, J.D. is a frequent speaker at events such as: T3, TD National LINC, Schwab Impact, AICPA PFP, Robust Wealth Digital Advice Conference, The XY Planning Conference and more. J.D. has been a member of the judging panel for the Orion Fuse hackathon since its inception in 2013 and organized the T3 Mash-up Collegiate Fin-tech competition.

J.D. is an avid player of Dungeons & Dragons (usually as the Dungeon Master), can beat his teenagers at Mario Cart, collects medieval weapons and loves a good romance novel.

KEYNOTES

Lead with Your Values

How to create and use your company's core values and statement of purpose to actually help you run your business.

From 45 min to 2 hours

- Process and rules for creating powerful core values
- How to roll-out and educate staff on core values
- How to use core values in marketing and external communication
- How to use core values to hire, fire and manage your firm

Evolving to Deliver Financial Advice

Don't get stuck doing the same things you've always done. We talk about two ways to defy conventional wisdom and improve your firm.

From 45 min to 2 hours

- Add a small client service model to grow faster and, surprisingly, attract larger clients
- Publish your racial and gender diversity statistics to attract more diverse candidates (especially if they are bad)

Herding Cats

What you do with your first Client Service Associate and Associate Advisor. Designed for firms under $100MM in assets.

From 45 min to 3 hours

- Who should you hire first and what do they do?
- How Abacus trains Associate Advisors
- The Abacus employee assessment process
- Advisor and Client Service career paths

KEYNOTES

You're the Boss

Prepare for the eventual need to hire and how to structure your firm in advance so you're ready for growth. How big do you want to be and how fast do you want to get there? Answer this by strategically laying out your long-term goals. Can be tailored to firm size.

From 2 to 8 hours

- Redefine your financials to include the opportunity costs of starting your own business.
- Combine these things to create a one-page business plan. The one-page plan is the key to communicating the goals of your business to your staff.
- Lay out future financial projections to decide when to hire and who.

The End Game

Will you stay free, join up, or get out? At some point, a decision has to be made about your end-goal for your firm. Creating enterprise value doesn't do you any good if you don't capture that value.

From 45 min to 2 hours

- Are you creating a permanently independent firm that will pay you cash dividends and will eventually be taken over by a new generation of advisors who you trained or acquired?
- Will you take the firm you've created and leverage it into becoming a partner in a larger firm?
- Will you grow it until it's the right size to sell so you can cash out?
- This session will help you determine your path so you can cultivate your firm to create the right kind of enterprise value for the path you've chosen.

Hiring Your Boss

How to bring on a manager to run your business for you. We'll discuss the right kind of person to hire, how to structure their compensation, and how to get out of their way so that they can become your boss and allow you to create the kind of life you want.

KEYNOTES

Expanding What's Possible with Your Service Model

How to expand your pricing and service model to accommodate clients beyond your "niche". We'll learn about how serving small clients can be improved by focusing on pricing instead of budgeting your time. We'll learn how very large clients can be served by focusing on values instead of adding services like bookkeeping, tax, and legal. We'll learn how to customize your service model for every client instead of assuming that one-size fits all. And we'll learn how to do it in less time than you're spending now.

Leading from the Bottom

You've seen problems in your organization and think you have the solution, but you're not an owner or in management. How do you help lead your organization as a team member with no explicit authority to make change? Or maybe you're an owner and you want your team to feel empowered to become changemakers in your organization. Learn how to identify the changes that are most appropriate for you to lead, how to lead without power, and most importantly, how to measure the results of your project.

Proposing Partnership

How to help design a partnership program to build an internal succession. Are you an up-and-coming star in your organization? Do you envision being the successor to the founder of your RIA? Or are you a founder who has your eye on the next gen? Learn the right way to propose, design and execute on an internal succession strategy. Abacus Wealth Partners went from three to twenty partners in 10 years. More than half of those partners started as employees and earned their way in.

Additional Topics

- Sustainability
- Diversity and Gender
- Technology
- M&A
- RIA Operations and Management

SPEAKING RESUME

Previous Speaking Engagements

- **FPA NORCAL 2020:** Retainer Planning: How to Price, Pace, and Plan for Monthly Retainer Clients
- **XYPN LIVE 2019:** The End Game
- **CFA SOCIETY OF ORANGE COUNTY**: Lead with Your Values
- **TD NATIONAL LINC:** Innovation Quest celebrity judge panelist with Robert Herjavec, Joel Bruckenstein, Heather Fortner, and Vijay Sankaran.
- **ROBUST WEALTH DIGITAL ADVICE CONFERENCE 2019:** Evolving to Deliver Financial Advice
- **XYPN LIVE 2018:** Herding Cats
- **XYPN XELERATE:** You're the Boss
- **INSIDERS FORUM:** Diamond Teams Workshop
- **GAIA STUDY GROUP:** Diamond Teams at Abacus
- **T3 CONFERENCE (2018-2020):** Host of T3 Mash-up Collegiate Fin-Tech Competition
- **ORION FUSE CONFERENCE (2015-2017):** FUSE Hackathon Judge
- **OTHER PRIVATE SPEAKING EVENTS AND EXECUTIVE OFFSITES:** Robust Wealth, Dimensional Funds, TD Ameritrade, FPA, and CFA Societies