

‘Know who you are and protect your energy’

By Sonya Vartabedian
The Chamber

Brad Small’s resume tells the story of a successful career in wealth planning and investment management.

The founder, CEO and chief investment officer of Solomon Private Wealth, LLC, Small has amassed 25 years of experience assisting clients in growing, preserving, protecting and transferring their wealth.

It is no accident that Small chose the name Solomon for his company. Like the third king of Israel, Small operates under the guiding principle of “wisdom to wealth,” fueled by a combination of strength, integrity, stability and stewardship and a mindset that values significance over success.

But the road to today has not been without its personal and professional peaks and valleys, triumphs and setbacks.

Through it all, Small says his unwavering faith, even during the lowest of lows, has remained his foundation and motivation.

“I believe the universe is looking for people to make it a better place,” he says. “If you move in that direction, you will receive the blessing, but you’re also expected to give the blessing.”

POWERFUL VALUES

The youngest of four, Small grew up on the Ryal side of Beverly, where he played pond hockey and learned to sail at Lynch Park.

He discovered his faith through his mother, who embodied strength and determination. Early on, he developed an appreciation for hard work and perseverance while shoveling driveways, caddying at Kernwood Country Club and working construction.

Small put himself through Gordon College in Wenham by living at home and saving money, and graduated debt-free with a bachelor’s degree in business administration.

“I’ve always been a fighter,” he says. “You can make up for what you don’t have by who you are. ... You don’t give up, you just keep going.”

Small earned his MBA from Babson College in Wellesley while working as vice president of the North Shore



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Chamber. From there, he entered the investment profession full time, holding senior- and executive-level roles with Wells Fargo Advisors, Smith Barney/Citigroup and Merrill Lynch.

“I always felt called to helping people build wealth and create opportunities that might be beyond what they were used to,” he says.

Later, a period of traumatic years proved devastating both personally and professionally. But through it all, Small says he remained true to his self as he

fought to rebound.

Two years ago, he seized the opportunity to begin an independent practice. Solomon Private Wealth is now in growth mode, looking toward expansion this fall.

‘JUST BE PASSIONATE’

Small remains committed to giving back through his support of various causes: missionary work through his church, Habitat for Humanity, Beverly Bootstraps and a foundation led by his good friends – Italian tenor Andrea Bocelli and his wife, Veronica – that empowers people and communities, with a particular emphasis on children and families. This October, Small is hosting his first charity car show on the grounds of Cruiseport Gloucester.

A past chairman and current member of the North Shore Chamber Board of Directors, Small is a past member of the Leadership Committee for the Boston Chapter of Christian Businessmen’s Committee.

Small believes strongly in the power of forgiveness, without which he says individuals cannot open themselves up to what’s possible.

But it’s a quote from Italian car manufacturer Enzo Ferrari – read on a recent trip to Italy – that has particularly resonated with Small: “You cannot describe passion. You can only live it.”

“I loved it, because that’s the way I try to live,” he says. “I mean, to just be passionate. If you’re helping people, be passionate, If you’re investing money, be passionate. If you’re out to dinner on a date, be passionate. If you’re



Brad Small, left, with state Sens. Bruce Tarr and Diana DiZoglio, at right, presents citations to Andrea and Veronica Bocelli commending the work of their foundation during an appearance in Boston.

sailing a boat or racing your cars, or whatever you do, just be passionate.”

What advice would you give a young adult preparing for a career?

“Remember who you are. As you go through life, you are going to find people who are jealous, who are negative, who unfortunately do not want to see you succeed. If you remember who you are, you can ignore that stuff.

“... I think the youth today are becoming much too influenced by what other people think of them. They need to be reminded that they’re worth it, they matter, that they’re here for a reason. ... The world may beat you up, but you need to focus on finding the good. Know who you are and protect your energy.”

What makes a good leader?

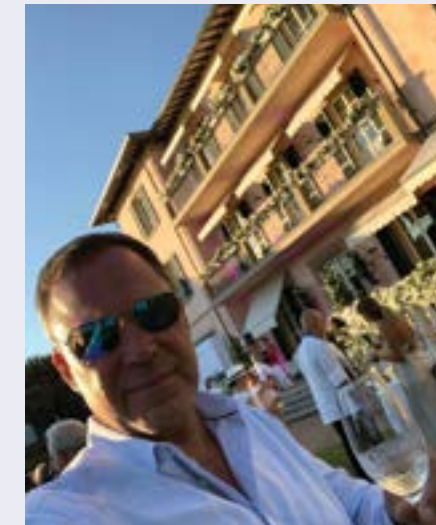
“The first trait is humility. That doesn’t mean a good leader isn’t strong or isn’t wise or directive. But I think if you can be all of those stronger adjectives, but do it with humility, then you can bring in believers and followers to help accomplish your mission.”

What one skill do you consider your biggest asset?

“Being willing to think differently and see differently. The technical analysis 30 years ago when I studied it was like voodoo finance. I was using something nobody respected, and now everyone is doing it. Being willing to think outside of the box, that’s helped me with my contrarian investing style. Zig when everyone is zagging or, as Warren Buffett, says: ‘Buy when there’s blood in the street.’”



Small, seen sailing on his boat, Wisdom, above, and traveling in Italy, below, says he practices joy and gratitude for his life every day.



What one thing can you not live without?

“My faith in God, because I’ve lived without everything else.”

What brings you joy?

“I’ve found you can’t look for things or people to bring you joy; you just

always have to have it. Can you do things to create happiness? Sure. But I think we put too much pressure on people to make us happy. Maybe the best word is gratitude. I have joy. And then I’m able to see joyful. Even in the tragedy, there’s joy.

“I believe I’ve got a life to live and I’m going to live it with joy and love and kindness. I wasn’t always living that. But this is what I now believe. It takes work to get there.”

How do you make an impact?

“I think I do it in small little bites every day. I ask God every day to let me meet somebody new – just one, and I have. And then I see how I can encourage them to have joy. Life is so short. You’ve got to open yourself up. And we’ve got to stop hanging on to anger and resentment.

“There’s always something to look toward, there’s always an opportunity to move toward. That positive thinking will help you get through.”