



STRELLNER

FINANCIAL GROUP

A CFG Member Office



Dave Menard

Business:

How long have you been in the business?

Thirty-six years ago, on November 20th, my career began in a rather unusual way. I found myself standing on a street corner, in the dark of night, under a streetlight, waiting for someone I had never met. This stranger was about to pick me up and take me to a place I wasn't even sure I'd reach. At that time, I was sick and tired of being sick and tired and willing to do almost anything to improve my life. My parents were deeply concerned for my safety. Even my wife at the time, who worked for the local police force, took precautions. She stayed hidden nearby and, unbeknownst to me, ran the plates on the car that picked me up... just in case! Long story short, the man who brought me into this industry became a lifelong friend and my first of many mentors. And the rest, as they say, is history.

Why did you want to become an advisor / Why should anyone else want to be an advisor?

I was hired into a marketing firm called MMCA, which offered only life insurance and fixed annuities. While I have always been connected to Transamerica, it was initially through National Old Line and PFL Life. In 2001, the owners of MMCA sold their firm to Life Investors, and that's when the possibility of entering the securities world opened for me. I believe many people, like me, are eager to change the direction of their lives and becoming an advisor provides a remarkable opportunity to make that transformation a reality.

What is the most important aspect of working with clients in your opinion?

Building trust and maintaining personal connections.

Personal:

Please tell us about your family.

I am the middle child of seven boys—talk about an experience! Growing up in a 900-square-foot house with three small bedrooms and only one bathroom was definitely an adventure. I've been married to Alexia Smaller for 27 years as of November 1st. She is not only my love and life partner but also the co-owner of Core Financial. We make a great team! Alexia has three sons, all living in Colorado, which is close enough for us to visit often. We also have two wonderful grandchildren: Evan, who just turned 4, and Nomi, who turned 2 on November 11th. They bring so much joy to our lives!

What do you like to do outside of working?

Wait... there's time outside of work? I must have missed the memo! Ha! I love spending time with my grandkids as much as I can as they grow and change so much between visits. I also enjoy being with MY

family, especially since my brothers and their families live nearby. As you might guess, Lex and I love to travel. We've visited many wonderful places in the U.S. and abroad. Hopefully, we'll get to do even more of that when I finally slow down... someday!

What is a surprising fact about you people may not know?

I think the story of how I got into this business might have surprised you!

Relationships:

Describe your association with Strellner Financial Group.

After the broker/dealer sale in 2016, Core Financial faced an important decision: go it alone in Colorado or join forces with other agencies. We were fortunate to be offered the opportunity to join Strellner Financial Group—a group of people we had grown close to over the years and considered family. It was an easy decision, and we jumped at the chance.

What value has Collective Financial Group provided you?

I truly appreciate the vision and culture of the agency and the opportunity to be part of something so special. The ability to leverage our efforts to create the best working environment and provide top-tier products for our advisors is remarkable. I'm especially grateful for the leadership's dedication to education within our industry, ensuring we are better prepared to serve our clients.

Why are relationships so important in this business?

Relationships are the steppingstones that help us achieve our goals and grow.

Thoughts or Advice:

Explain what it takes to be a successful advisor?

My idea of success may differ from others', so it's important for each of us to determine our personal "WHY" in our careers. This helps us stay aligned with our core beliefs and maintain balance in our lives. This career isn't about instant wins—it requires discipline and dedication over time. Surrounding yourself with other successful people in the business not only challenges you to grow and improve your knowledge and skills but also brings the joy of lasting friendships and fun along the way.

As a leader in this industry, what is your #1 tip for those up and coming?

Just remember this: if you do everything in your power to help your clients reach and exceed their financial goals—whatever those goals may be—you will be rewarded many times over for your efforts. To become their trusted advisor, you must continuously learn and expand your knowledge. Knowledge is power; it builds confidence and strengthens your interactions. Surround yourself with successful people in the business and model their habits for success.

Comments from Leadership:

"Dave has been an integral leader since joining our SFG organization, consistently demonstrating a deep passion for his clients, his business, and helping others succeed. His dedication and care are truly remarkable—qualities not often found to this degree. We are grateful for the impact he continues to make within our team and the lives of those he serves." - Tom Fox, Rusty Fieldman & Eric Kaestner, SFG Partners