

Options for a New Economy – My Friend George and His Master Stroke of Genius

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Retirement Rehab

George is one of the most gifted salesmen on the planet. How in the world could he be in such a terrible financial situation at age 53 only a year ago?

As a first-generation American, George and his 4 siblings all went to Ivy League schools. His father had come from Spain and believed education was the key to success. Two doctors, one engineer, one real estate entrepreneur, and George was the youngest. When he got his first job at Bankers Trust flying all over Latin America, he seemed like the most successful of the lot.

He married Ellie, his college sweetheart and a northeast prep school kid. They had three daughters in rapid succession and George was adopted into a well- to- do WASPY extended family. His in-laws had a summer “castle” in Normandy, which only added to George’s repertoire of stories and experiences.

We met at Goldman Sachs where George was hands down one of the best salesmen.

George could walk into a meeting cold and connect like he’d known the older rich guy his whole life. Somehow George could quickly make a human connection where there had never been any familiarity. It didn’t hurt that George hunted, fished, and smoked cigars with cognac in connecting with older rich white guys. His career trajectory at Goldman was so rapid that the senior partners would travel with him to Brazil, Argentina, and other exotic locations. He was a natural born salesman if there ever was one.

Nobody knew this was taking a toll on Ellie and she suffered from depression. Nobody knew this morphed into alcohol abuse. Nobody knew of the chaos George found when got back from business trips. So, George moved to Brazil to work for a family he knew and to run their bank. He wouldn’t have to travel and he could be there for Ellie and the girls. He built an amazing support system using cheap local help.

The problems of Ellie going off her program continued. She even retreated to the US to go to rehab. She did this several times.

George helped sell the bank he ran and relocate to Connecticut. This was close to Ellie’s family and her siblings. George took a much less demanding job as the girls went through high school. George tried to step up and keep his daughters’ lives as normal as possible given their mother’s condition.

True to form, his girls attended NYU, Cornell, and Boston College all on student loans George signed for personally. George now owes over \$6000 per month for about the next 6 1/2 years. Ellie and George finally divorced when the youngest got into college. George owes 30% of his gross income to Ellie as alimony FOREVER.

To say money is tight for George is a massive understatement.

But George isn’t bitter, he’s always working an angle. He called me and I helped him get a job overseas working

with me. **He easily extended his career length five years and lowered his cost of living and his taxes.** As you would expect, he became a mini-celebrity as a senior salesman. The younger folks have never seen an animal like George. They literally give him relationships too tough for them to crack so they can sit in the meetings with him. His appointment calendar is booked solid.

One day George came to me and asked me about “that internet stuff you do”. He knows about my physical products business and all the information products I’m involved with. We have lunch every weekend and he is always inquisitive.

George deduced that there are a lot of relationship managers in their 30’s that never had the opportunity to go through a Goldman Sachs training program, or any other for that matter. They all yearn for professional development and little is offered formally. He gets asked for help every day. George sees an opportunity.

George wondered, “What if I could coach several of them and create a course with what I learned that could help many more?” **Brilliant!**

George’s Plan

George’s plan is to find the areas of greatest interest and film a series of 90 minute workshops he will hold. After each workshop, he will ask what are the next series of topics his protégées would like to cover. He has a rough outline he’s constantly refining.

George is taking his first step in the next 6 weeks to help five very eager younger salespeople. His biggest struggle is the word is getting out and more people want to attend. They are even offering to pay money to be involved! He’s now debating the optimal size to get the best outcome for everyone involved.

This is how it is all starting again for George. It’s exciting to see and be a part of. What’s amazing is he’s only a couple of steps ahead of most people reading this story.

The advice I give to friends like George and others who seek me out: “*Work to learn, then make money with what you know*”.

Join our community and create a plan to do what you love while adding income to retire happy.

Best,

Ian Bond



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