

From Values-Based Investing To helping play Cupid



Grant Meyer, CFP®
Founder of GTS Financial

Since the pandemic, the percentage of investors wanting to invest in environmental, social and governance (ESG) products has nearly doubled, according to a recent survey conducted by Ernst & Young, and that figure is projected to nearly double again in the next two years.

For sure, socially responsible investing (SRI) is an increasingly popular buzz phrase. But at Bloomington, Minnesota-based GTS Financial, it's not just lip service.

"I'm proud that for us socially responsible investing is more than just words," Grant Meyer, CFP®, founder of GTS Financial told *Advisors Magazine* in a recent interview. "It's part of our culture and organization, and we go above and beyond in that area," he added. Case in point: GTS Financial believes that business can be a force for the betterment of communities, which is why

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No jargon here, just
straightforward advice.**



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it offers pro bono financial planning. Meyer also founded a non-profit organization, Advisors For Good, to advocate for SRI/ESG in the financial advising world.

GTS Financial does not require a minimum investment and operates as a fee-only fiduciary. In addition to helping retirees, widows and widowers, Meyer said the firm works with a lot of younger professionals who might have high incomes, but not many assets at this point in their careers. Many of them are looking to align their investments with their values, which is a nice fit with the GTS core philosophy of socially responsible investing.

"This philosophy has resonated with a lot of our clients," Meyer noted. "And we've gotten a lot of prospective clients coming in asking about our SRI service, as well."

Early on, Meyer did not expect to pursue financial planning as a profession. He thought a career as a financial planner meant being a high-pressure salesperson. However, he went to a career fair during college and was surprised to learn of the many financial advisors who help and care about people.

"I realized that for some advisors, there was no product to push, no earning of commissions," he recalled. "Instead, you get to truly help people and make an impact in

their lives — and that just kind of blew my mind."

He took an internship at the start of 2008 with a local financial planning practice that shared the client-first philosophy. From there, he was hooked and has found his lifelong calling.

The next step was starting his own practice. Refusing to be pigeon-holed as a stock picker eyeing the next hottest investment, GTS Financial's strong suit is working closely and collaboratively with clients on virtually any decision involving money. And that approach has taken Meyer and his team into some atypical — but enjoyable — financial guidance areas.

"So, just the other day, a client tells us he wants to find a significant other; and there are many different dating services and match-making coaches out there," Meyer said. "Some of them require four-figure down payments and have various fee structures."

Without hesitation GTS Financial jumped in to help. "We analyzed dating services and dating coaches with him," Meyer smiled. This is typical — GTS Financial aims to help with all decisions involving money, which can take some interesting twists and turns.

Indeed, transforming lives—not just money—is a GTS hallmark.

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