



Investment adviser and financial coach James DesRocher sits near his “Innovation Alley” wall in the TrueView Financial office.

The big picture

TrueView Financial is invested in helping clients in all aspects of life

Centrally located on Middleton Green, James DesRocher’s financial coaching agency, TrueView Financial, embodies his personal and professional goals — to live a happy and fulfilled life with a secure financial future.

He opened his office, called the Freedom Center, in 2018, after years of working in the industry in Wakefield and realizing that a new way of approaching the financial world would put his clients — and his family — ahead of the game.

“You have the world of Wall Street versus the world you create. It’s two worlds out there. There’s a whole other world that’s available,” says DesRocher, a Life Underwriter Training Council Fellow (LUTCF) and a Million Dollar Round Table (MDRT) member. “We’ll give you an X-ray or ‘True View’ of your situation. The ‘aha’ moments you’ll have lead to more freedom and happiness. “

The 34-year-old investment adviser and financial coach earned the Five Star

Wealth Manager award in 2018 and 2019 for his experience and quality of services to clients. He is a 2007 graduate of St. Anselm College, where he earned a degree in financial economics and was a member of the college’s football team. More recently, DesRocher’s training included learning the theories of Eugene Fama, who won a Nobel Prize in economics in 2013.

“It was a pivotal moment in my life,” DesRocher says of being exposed to a new

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method of thinking about finances, adding that instead of Wall Street reaping financial gains, clients can make changes so they see returns on investments and in other areas.

“We don’t just address one area of planning with you, we address your whole picture, everything from retirement to investing to insurance needs,” he says.

For example, he says, “Let’s look at 100 areas of your life and try to make each one 1 percent better. Then you’ve made things 100 percent better.”

DesRocher’s office is a comfortable place for meeting with his “family of clients,” complete with a fireplace, round conference table and sitting area. Monthly seminars and coaching sessions for clients and potential clients aim to be light and fun, teaching people about importance aspects of finance they may not be familiar with, such as how different types of investments might give you greater returns than what you might expect.

He finds inspiration from a wall in the office called “Innovation Alley” that features several framed mementos nodding to great achievers and achievements, such as the Declaration of Independence; the Wright Brothers; Walt Disney; Sir Timothy John Berners-Lee, known as the inventor of the World Wide Web; and DesRocher’s favorite television show, “The Men Who Built America.”

His office is walking distance from the home he shares with his wife and two children, saving him precious commuting time.

Since moving to Middleton in 2016, DesRocher has become involved with the community through work with the Middleton Board of Trade and the Recreation Commission, coaching tot soccer, and helping with community activities such as a recent “Shop Middleton Day” and a food truck festival last fall that generated more than \$3,000 in donations for the Middleton Food Pantry.

DesRocher’s entrepreneurial spiritual was born when he was a youth, helping his family to make ends meet. His job between ages 10 and 13 was picking tobacco leaves in Enfield, Connecticut, where he was born and raised. That challenging position taught him to seek a more fulfilling vocation. One of four children, his mother was a waitress and his father was a truck driver.

“We didn’t always have heat, but my mother made a happy home,” he says.



DesRocher opened TrueView Financial last year on Middleton Green, which is close to the home he shares with his wife and two children.

He calls his mother his hero, and notes that she instilled in him tenets that have guided him and launched his confidence in his new venture, including having a strong work

ethic and a belief that anything is possible.

“You have to believe in yourself to make positive changes,” he says. “We can create your American dream together.”