



WESTPAC
WEALTH PARTNERS
PROTECT • INVEST • ACHIEVE

CONTENT FROM WESTPAC WEALTH PARTNERS

PROFILE 2019 | BEST MEDIUM WORKPLACES

Big Dreams Equal Big Success for This Medium-Size Firm

A commitment to diversity and an unwavering belief in the American dream are driving the culture of excellence at **WestPac Wealth Partners**.

NASH SUBOTIC KNOWS SOMETHING ABOUT

starting from scratch. The founder and CEO of WestPac Wealth Partners, a privately held wealth management firm based in La Jolla, Calif., came of age in Serbia after escaping war-torn Bosnia. He later immigrated to the U.S. on a college basketball scholarship, then taught himself English while successfully pursuing a bachelor's degree in international business and an MBA in finance. After college, he rose to a leadership position in finance before founding, at age 28, the company that would become WestPac Wealth Partners.

“Being challenged early in life prepared me for the business world. I think it gave me a little more drive and life experience than the people I was going up against.”

NASH SUBOTIC
Founder and CEO
WestPac Wealth Partners

“Being challenged early in life prepared me for the business world,” Subotic says. “I think it gave me a little more drive and life experience than the people I was going up against.”

Subotic’s personal experience set the stage for WestPac to embrace diversity in its multiple locations across the U.S. Today, the firm’s 160 financial advisers and 40 support members represent more than 30 different countries.

WestPac organically develops most of its advisers and leaders. As part of orientation, all new associates are taken through the WestPac Way, a proprietary onboarding process that educates them about everything from marketing and practice management to advanced planning concepts and product knowledge. This promotes a culture of excellence through teamwork, hard work, and always doing the right thing.

And that education is put to good use; WestPac advisers help their clients make smart decisions to navigate the complex financial world that we live in today. They provide their clients with advice on wealth management, tax strategies, asset protection, and business succession planning, among other financial services.

This year, WestPac is on track to generate over \$25 million in revenue, matching its objective of a 22% increase year over year—an unusually strong performance rate for a company of its size. The firm’s good fortune is due to the drive its associates have to help their clients achieve and protect their American dream. And now the company’s success has landed it on *Fortune*’s list of Best Medium Workplaces.

At a stakeholders meeting back in 2013, Subotic and others projected their greatest dream for the firm. “Believe it or not,” he says, “we talked about how we wanted to one day be featured in *Fortune*. We’ve always thought big!” ■



Congratulations WestPac Team!

Success is the result of a well-designed future.

Our business is to help clients make smart financial decisions to navigate the complex financial world that we live in.



Wealth Management



Insurance Optimization



Asset Protection



Business Succession



Tax Strategies

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WestPacWealth.com

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