



BUSINESS & FINANCE AWARDS 2020

JESSE GIORDANO

**PRINCIPAL AND FINANCIAL ADVISOR
OPAL WEALTH ADVISORS**

Jesse Giordano specializes in empowering clients to create the financial future they want. Through Opal's proven approach, he helps with behavioral changes that enable clients to create purposeful plans—backed by effective actions.

Giordano formed Opal Wealth Advisors with Lee Korn and Joe Filosa in order to make a meaningful difference in clients' lives with a visionary process of financial planning and investment management. Prior to Opal, he co-founded the 360 Group inside Morgan Stanley, working as a Financial Advisor and Family Wealth Director. Giordano began his career at Merrill Lynch.

A graduate of SUNY Cortland, Giordano

also holds an MBA in Financial Management from Pace University's Lubin School of Business and is a Certified Financial Planner. He was recognized as a 2019 Best-In-State Wealth Advisor by Forbes, a list honoring top advisors across the country.

A blood cancer survivor, Giordano sits on the Board of Trustees for the Leukemia and Lymphoma Society (LLS) and was awarded Long Island's Man of the Year title in June 2020. He's also on the board of advisors for Mercy College MBA program.

Giordano additionally volunteers his high-level training skills as a speaker helping college students learn about financial literacy and leadership.



Have you always considered yourself a “numbers person”?

Math always came easy for me. In 10th grade I went to Spain for a student exchange program and had to teach myself algebra. When I returned, I scored the highest grade in my class on the lessons I taught myself.

What professional goals are you currently pursuing?

I started Opal Wealth Advisors, a fiduciary investment and financial planning firm, in 2019 with my business partners Lee Korn and Joseph Filosa. Our goal is to grow Opal Wealth Advisors to 25 Financial Advisors by 2025, and to 100 Financial Advisors by 2030.

What do you think lies ahead for your industry in 2021?

People's access to investment and financial planning information is getting more and more accessible. This coincides at a time where face to face meetings are not happening much anymore. With investors having greater access to information on their own, and less opportunities to build relationships face to face, financial advisors must become better “thinking partners” for their clients. This requires that financial advisors develop their “soft skills” to become better communicators, better listeners, and skillful at helping clients clarify goals. Financial planning will evolve into financial life planning where clients will seek and retain advisors who can help them go from intentions to actual achievement of meaningful goals. Advisors will have to practice humility, authenticity, and share both personal successes and failures with clients as a way to build trust and make them more accessible emotionally. In an industry that has built its identity on “Investment Excellence”, many financial advisors may struggle with confronting the idea that knowing all there is to know isn't all that clients are looking for.