

## THE TERRIO GROUP TO CELEBRATE TEN YEARS IN BUSINESS ON THE TREASURE COAST

PORT ST LUCIE, FL, August 28, 2018—The Terrio Group is celebrating ten years in business on The Treasure Coast on October 1<sup>st</sup>. The milestone year is remarkable for Founder Mike Terrio who started the financial and retirement planning firm after experiencing firsthand the financial devastation that can result after a family crisis. The hard lesson learned was the catalyst that marked Terrio's determination to help as many people as possible from facing similar consequences. This hallmark year is even more meaningful when framed from a timing perspective.

The Terrio Group was founded in 2008, the same year as the recession, when retirees alone lost over \$2 trillion over the course of fifteen months. "Opening our doors during the biggest downturn since the depression was an eye opener. It helped us really hone in on what was important to each new client who walked through the door. For instance, a 76-year old widowed female is going to have a completely different financial wish list than a husband and wife in their early sixties who are preparing for retirement and deciding what to leave their grandkids. But when you start the dialogue with the inspiration conversation and you embark on formulating a strategy together, that's when real progress can be made."

Mike hand-assembled a team of professionals that shared his vision and altruistic nature, opening offices in Stuart and Port St Lucie in Florida and in Edina, Minnesota. A great testament to the growth of the company is the signature process that organically grew from the series of one-on-one sessions that are a trademark of The Terrio Group.

These *inspirational conversations* allow The Terrio Group advisors to extract the information needed to personalize the selection of financial vehicles that can benefit and reward each client's unique lifestyle wants and needs. The process grew over time to its present iteration as *The 8 Elements of Financial Control* and is seen as a revolutionary model that examines all angles to truly get that comprehensive financial plan in place.

The team attributes much of their growth to putting the system in place and consistently following it, and they are not the only ones. *The 8 Elements of Financial Control* is also being adopted by a growing number of financial advisors. When asked about what's on the radar for the next ten years, Mr. Terrio was quick to emphasize the importance of maintaining the intimate, extended-family environment of his offices, no matter how much they grow.

"The constant changes within the economy are not something we can control. But what we can do is give our clients something they can consistently count on, and that's our process. We also want to always be prepared, and we do this with the right technology in place, which streamlines efficiencies in our process. At the end of the day, we want to always be evolving, always minimizing our clients' risk. And that's how we want to spend the next ten years."

The Terrio Group will be making exclusive offers available to new and existing clients to kick off their tenth year in business.

### **About The Terrio Group**

The Terrio Group is a financial and retirement planning firm with offices in Stuart and Port St. Lucie, Florida, and in Edina, MN. The Terrio Group provides comprehensive plans that utilize financial

instruments to generate, protect and grow retirement income, as well as protect the estate and legacy of clients, with long-term care and investment guidance options. The Terrio Group team uses a signature process conducted over a series of sessions to examine all opportunities for building and protecting wealth. All plans include an educational component designed to put the client in a position of power as a proactive investor, rather than a reactive consumer.

For more information, visit [The Terrio Group](#) online and check out the latest activity at [Facebook](#) and [Twitter](#).

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