Meet John Baltes with SVA, A Professional Services Company

My primary responsibility, I view it as CEO, is really to use all the resources SVA has available to us to help our clients and to help our team members. So my role is really not to just set vision, that's part of it, but it's really to facilitate on what we're going to do for people. How we're going to help them, you know, where we want to get as a group. You know, so we can talk about a leader like myself as a CEO and people think, well you're gonna strategize. No, I need to facilitate people working together. The blend of minds inside this company is huge. How I take the blend of those, set direction, and then bring all the SVA resources into the picture is what I do on a daily basis.

So, what gets me excited about the work I do, really in coming to work every day, is our clients and our team members. Everyone's unique, every situation is unique. There's not a day that goes by that I don't learn something from someone. Learn something about a situation, learn something about how we solved a problem. It's kind of that challenge, that daily challenge of understanding and working with people that really drives me. It's hugely, hugely rewarding.

So what sets SVA apart, in my mind, from other professional service companies, is how we deal with clients, how we deal with team members. So we're not just focused on the here and now, we're not just focused on your current problems, how to resolve them, how to prioritize them. Those are all things we do and do very well. I think what sets us apart is helping you foreshadow what's coming next. So we get by one thing, what's out in our future? You know, what's trending? What's happening in industries that might affect us? What's happening in our economy? What's happening in your profession? So you know, our ability to project a company forward, not just solve today's problems, is what sets SVA apart.

So, the SVA Financial Group, you know, we are responsible for helping individuals. But when you get into talking about individuals, there's uniqueness. There's uniqueness in their situation, there's uniqueness in their family, there's uniqueness to the businesses they might operate or own, where they work. Every one of these has a bit of uniqueness to it. So what we do is we work with them. We have to understand what their goals are. We have to understand what their risk tolerances are. We have to understand their specific situation. That's where we excel. We're not investment managers, we are people managed. We help them meet their goals. To do so, we have to put all sorts of things in place for them financially, for them personally. Now this goes from maybe operating business in to how we handle their wealth through an investment standpoint, all the way onto how we might handle them after life and what they want their wishes to be. Whether that's philanthropic, whether that's the transfer of wealth. We can handle them all the way from operating in a business, through their individual/personal wealth management, all the way past life to make sure that their goals are met.