

NEWS

For Immediate Release

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Sandra Nesbit Launches New Consulting Company: Mainsail Capital Group



Former financial advisor will use first-hand experience as a client-facing wealth manager who successfully navigated from wirehouse workplace to independently-owned boutique RIA to merging with a larger nationally-known RIA.

CLEARWATER, FL. (January 22, 2020) – Former financial advisor Sandra Nesbit has launched her own consultancy, [Mainsail Capital Group](#), to help other financial advisors as they work through “what’s next” in their business decision-making process. Nesbit will draw from her own twenty plus years of experience working with clients as both a fiduciary wealth manager and a registered representative for major financial services brokerage firms. Having successfully merged an independently owned and operated wealth management firm she co-founded up and into a larger, nationally-known Registered Investment Advisory group bolsters her ability to help other advisors take the most thoughtful approach to their own business development, continuity and succession planning strategies.

“Succession and transition will be one of the most important decisions an advisor will make in their lifetime,” Nesbit said. “Unfortunately, many advisors don’t know what they don’t know – and there may only be one opportunity to get it right. Going through any business transition is similar to dating and marriage. I established Mainsail Capital Group to help guide investment advisors and registered representatives through the challenges that may occur prior to making the commitment. We want to provide the knowledge and resources to have a successful partnership. My goal is to always be client centered and driven to provide solutions and services as they are needed.”

ADDRESSING THE TOPIC AT INDUSTRY FORUMS

In April 2019, Nesbit was invited to speak at the Tiburon CEO Summit held at The Wagner hotel in New York City. Tiburon's CEO Summits provide a unique opportunity for a select cross-industry group of senior executives to discuss a broad swath of issues regarding the future of the banking, insurance, brokerage, and investment management businesses. During a mainstage panel discussion, she shared her first-hand experience of an RIA deal and advice for best potential outcomes. At the time, Sandra Nesbit was a Managing Director with Mercer Advisors. In this [video “exit interview”](#) Nesbit provides a short recap of her comments and shares impressions as a guest speaker.

In August 2019, Nesbit was invited to participate at the Advisor Thought Leader Summit held at Rockhurst University in Kansas City. This privately-hosted event was open to a select group of tenured financial planning professionals. Nesbit was hand-selected by the conference hosts. In this [video interview with Pam Krueger](#), who for over 20 years produced the MoneyTrack show for PBS, Nesbit shares why she established Mainsail Capital Group after transitioning from her own successful financial advisory firm and how she now brings her personal insights to other financial advisors as a consultant.

In December 2019, Nesbit spoke at the Florida RIA Summit, a gathering of independent RIAs focused on discussing investment strategy, global trends and best practices in compliance, technology and RIA M&A. At this event held in Boca Raton, Nesbit shared her insights on not only being a successful RIA for many years and how she negotiated a successful merger with Mercer Advisors. This video clip provides [a four-minute statement from Nesbit](#) on how financial advisors and others who are interested in finding the right partnership, without regrets in hindsight, might want to think about the complex M&A landscape.

Nesbit is available for panel discussions, workshops and presentations. She is especially interested in helping financial services professionals who have an entrepreneurial stake in an investment advisory business make better decisions.

ABOUT SANDRA NESBIT AND MAINSAIL CAPITAL GROUP

Sandra Nesbit is the Founder and Principal of Mainsail Capital Group (MCG), a specialized boutique consultancy that serves independent financial advisors as they move through the process of “what’s next in their business.” Nesbit is also a current Director at [National Advisors Trust Company](#) and serves on the Governance Committee. She is a Certified Divorce Financial Analyst™ as well as a Certified Estate and Trust Specialist™.

As a former Managing Director of a large, [nationally-known wealth management firm](#), Nesbit was responsible for M&A activities after merging her independent financial advisory firm with them in 2018. Prior to this merger in 2019, Nesbit was a co-founder, Principal and Managing Partner of GFS Private Wealth, LLC, where she served as a fiduciary to clients and lead a successful fee-only wealth management RIA practice where, in addition to firm leadership, she focused on Total Wealth planning for affluent individuals and their families, specializing in the areas of legacy planning, including wealth transfer, and conducting family governance meetings. In 2015, under her direction, the firm started Mainsail Family Trust, a Trust Representative Office of National Advisor Trust Company.

Nesbit left the brokerage industry in 2012 to become a fiduciary financial advisor and independent business owner. Her career in the financial services industry began at IDS Company in 1992. IDS was an early adopter of financial planning and recognizing its impact for clients. Nesbit took her knowledge to Merrill Lynch in 1994, where she was instrumental in the development of the firm’s financial planning tools and trained advisors the benefits of using planning. She became an advisor in 1997 at Merrill Lynch.

For more information on Mainsail Capital Group and their consulting services, presentation topics and expertise, visit www.MainsailCapitalGroup.com.