

Entrepreneur and Wealth Advisor Paula de Vos Reflects on Her Beginnings in Business



[Paula de Vos](#) is the founder of [Synergist Wealth Advisors LLC](#) in California. Synergist Wealth Advisors LLC is an independent, private wealth advisory firm that strives to combine the high service standards of a multi-family office with the investment expertise and operational excellence of a global institution. The firm provides full suite wealth planning and advisory services in addition to investment management. Consulting includes diverse areas such as trusts, estates, private foundations, retirement, investment strategies, and family governance. The company clientele is made up of high-net-worth individuals, executives, and families looking for a highly personalized, collaborative, curated, holistic approach to wealth management.

So how did it all start? In an interview with Wall Street Chic radio, Paula de Vos said it's a combination of background, education, and passion that got

her where she is today.

Education in Academics and Business

After receiving her BA in Economics from the University of California-Berkeley, [Paula de Vos](#) worked for economists performing economic research and then worked for a small business before returning to get her MBA in Finance from the University of San Francisco as well as later her Certified Financial Planner® certification.

After graduating, she worked for several large corporations in private banking. Still, her dream was to offer clients more than what she saw around her. Paula de Vos explained that there can be product biases and conflicts of interest under a bank or brokerage's models & corporate structure, especially if they're sales driven.

"I wanted to offer clients and people the best of what was out there without biases or conflicts of interest, and to create a synergistic opportunity in the industry to work in a truly open architecture type platform," says de Vos. So she founded a firm 18 years ago based on delivering great solutions to clients without the constraints of a single product or suite of products often seen in financial services. The goal was to solve client problems using those principles. The result was enjoyment and fulfillment from lasting relationships with people she works with ever since.

Advice to Young Entrepreneurs: Use All Your Experience and Follow Your Passion

"At the end of the day, when I decided to found a firm, it became an amalgamation and combination of three things: passion, experience and background. To everyone out there, you certainly can take different pieces and parts of your life and turn it into something that you create, develop and enjoy," says [Paula de Vos CFB](#).

In an interview with Wall Street Chic Radio several years ago, Paula was asked if she knew she wanted to be a financial advisor when she was a little girl. She laughed and said absolutely not and stated that she wanted to be a dancer, ballerina or modern dancer. She finished by saying, "It's really not so different at the end of the day because it's all about creativity. And those connections, that love of creativity applied to in-depth industry knowledge and hard work are how [Synergist Wealth Advisors LLC](#) began."