

GO RIA PRACTICE MANAGEMENT



When picking office space, remember this is "your second home"



Vanessa Martinez in her office.

Advice on how to make the space welcoming and memorable for clients.



It's been often said that we'll spend more time in the office than at home in our lives.

So, it makes sense that designing the office space should feel like a second home. And for many advisors, including new RIAs, it really is.

"Lead with your gut when it comes to office space," says Vanessa Martinez, CEO and managing partner of Expressive Wealth, comparing it to the process of buying a first home. "When you're picking an office space, this is your second home. Make sure that when you walk in, you can feel that this is your place,"

She explains the vision she had for her firm. She wanted to create *a cozy, home-like environment in her office* that would make clients feel comfortable and at ease.

Ad removed. [Details](#)

She also incorporated French doors to maintain transparency and accessibility, allowing her team to easily check in on her while also providing privacy for client meetings. Her office reflects her personal style and brand, focusing on creating a calm, serene or "Zen" vibe using light colors, soft furnishings, and live plants.

"I believe that having things that are alive in your office are super helpful" she says. "Not just for the air we breathe, but the vibe in itself."

Sean Williams has taken an unconventional approach focused on simplicity and fun. Rather than the typical stuffy atmosphere, the principal and senior wealth advisor at Cadence Wealth has worked to cultivate a space that reflects his firm's brand and values.

"The main driver for what we were trying to accomplish is to make things simple, but also to make things fun," Williams explains. "And that's not typically something associated with our business - fun."



From handmade furniture to the TV screens displaying engaging content, Williams' office aims to provide a welcoming and memorable experience for clients.

One unique touch is a pull-up bar with yellow footprints and a button that "yells at you while you're doing pull ups to give the experience of being yelled at in boot camp again," he says, highlighting the nod to the team's military background.

"It's to make things interesting and fun, because it's not something you normally get with a financial planning experience," he notes.

Kashif Ahmed, president and founder of American Private Wealth, is a firm believer in the office reflecting the brand. From wearing tailored clothes to writing with fountain pens, his brand and office is one that reflects being "elegant and old fashioned".

He notes the colors in his office, such as the accented burgundy, maroon walls, are exactly the same as the color scheme used on his firm's website.

He says this creates a seamless, continuous experience for clients; when they visit his website and then come to his physical office, the aesthetic is consistent.

For advisors setting up their own offices, whether in a dedicated firm space or a home setup, Williams emphasizes the importance of professionalism through quality lighting, sound, and equipment, adding that a \$200 investment in the right camera, microphone, and lighting can make a big difference in virtual meetings.

Ahmed suggests investing in practical, cost-effective solutions like getting furniture from Costco or other wholesalers rather than overspending on an overly formal office.

He also asserts *making the office inviting and warm*, so clients feel safe and can talk about anything.

"Avoid Wall Street. I don't have statues of bulls and bears," he says. "No CNBC, trade publications, or other nonsense that can make clients feel uncomfortable and definitely don't have your awards out on display."

He also advises avoiding formal, intimidating setups like sitting across a desk from clients. Rather, advisors should "have a more casual seating area where you can sit next to them."

Martinez suggests *having a business plan for future growth*, which allows room to upsize or downsize the office, as needed.

The key to designing an office space, says Rob Schultz, senior partner & wealth manager at NWF Advisory, is striking a balance between professionalism, credibility, and a personalized but not overly distracting home office environment to make the best possible impression on clients during virtual meetings.

Ultimately, as most advisors will attest, "the look and feel of the office, home office, or hybrid comes down to the flavor of your practice and clients," says R. Philip Petrowski, private wealth advisor at Blackhorn Partners.

"Many of my clients live out of state and will never see the inside of the physical walls. While the location is convenient and professional, it's more about serving me with dedicated space. Some advisors are still very brick and mortar and require marble and mahogany," he wrote in an email.