Island Entrepreneur

Stephanie Mackara

Bernie, Stephanie, and Jacob

What section of the island do you live in and how long have you lived there? Cochran Park, four years.

Where did you grow up? I lived and worked in the greater Philadelphia market for most of my life.

Tell us about your family: I have a wonderful and supportive husband, Bernie, who is in the banking business, and we have an 8-year-old son named Jacob who every day inspires and drives us to be the best we can.

What are you your hobbies/interests? I enjoy running, cooking, travel and relaxing with my friends and family.

What is your profession? I am a Wealth Advisor and the owner of Charleston Investment Advisors.

How long have you been in business? The firm has been around for over two decades, but in early 2014 I purchased the company and changed the name to Charleston Investment Advisors. Our sole purpose is to provide clarity, insight and partnership to our clients so that they can have a more secure financial future. We achieve this by pulling back the covers and understanding our clients "Why?" We have a saying that *investing starts with a plan*, and we work very closely with our clients to understand what they uniquely wish to achieve and then build a financial and investment plan to help them get there. We also work closely we with our clients other advisors (attorneys, CPAs, etc.) so that our advice is thoughtful and pertinent to all areas of our client's lives.

How did you decide on this industry? My academic background is in psychology and the law; however my professional career has always been grounded in financial services. My passions for each lead me to an industry that historically has been one dimensional. All three of these disciplines are extremely analytical and I believe my experience with each allows me to offer clients a much broader and deeper perspective on how their finances can be a catalyst to realizing their dreams.

What prompted you to start your own business? Right out of college I joined a startup investment firm and was bitten by the entrepreneurial bug. I spent the next 15 years with the firm and then helped sell and merge it into new ownership. From there I started an investment management firm in Philadelphia, but soon decided that our family wanted to make a home on Daniel Island. So I took steps to channel my experiences and my passions and decided to serve clients directly, helping them achieve their personal and financial goals here in the Lowcountry.

What is the most important aspect of your business? We are fiduciaries to our clients. As fiduciaries, we act solely in the best interest of our clients. We don't sell product and we don't work off of commission. You can be sure that when you work with our firm you will get conflict free, unbiased advice—no two clients share the same plan or investment policy statement. We also offer a unique service to prospective clients called a GAP Analysis gratis. This service provides individuals and businesses with a detailed analysis of their current investments, savings rate and probability of success in retirement.

What is the most gratifying part of your work? Most people view my profession as a sales profession, but I see it as a helping/service profession. Helping clients realize their dreams is the most gratifying part.

Anything else you would like to include? Know and understand what you own and how it is going to help you achieve your goals—both short and long-term.

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If someone you know an island business owner, or someone who is doing something extraordinary or unique in the community, and would like him or her featured in Daniel Island Life, please email **josef.bologna@n2pub.com**!