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How I learned to start learning and hope to never stop.

As a former baseball pitcher, has-been athlete, I can relate much of what I used to do on with what I currently do with our clients as it relates to a topic near and dear to my heart – the pursuit of excellence.

Excellence for me was about playing to my strength (throwing a ball); deliberate practice on the craft of pitching, and making sure my weakness (fielding) wasn't so weak that opposing batters at only 60.5 feet away posed a real danger. The potential for learning (feedback) and appreciation for my teammates was everywhere and always when I was pitching. If I threw the wrong pitch to the wrong hitter, the negative feedback was often immediate if my ego allowed me to "listen." Regardless, to succeed I needed to trust my fielders to make the plays they ~~should~~ could, learn to trust my catcher's signals (and pitch away from hitters strengths) and appreciate what my coaches would tell me.

Focus offers me the wonderful opportunity to help investors and their firms learn of and leverage their strength(s), develop better process and execution habits and think strategically about how they can best win versus their competition. Does the team have the right players, do they understand and respect their roles and are they as well as the firm positioned for success?

While my first love – throwing a ball – carried me through my first 23 years, in 1990 I learned of the purpose that will likely carry me through the rest of my days. In 1990, while living with my parents post-graduation, I watched how my father and how my parent's relationship changed when his employer went bankrupt. At the age of 59, my father needed to find work because he wasn't ready for retirement. I internalized this experience, the wrongness of retirement, and quickly learned of my passion to help others improve their financial lives.

"In this beginning," there was financial planning work, defined contribution consulting and teaching. One aspect of excellence is continuous learning, and this new direction of mine led to my pursuit of the CFA designation. Perhaps equally valuable were my experiences with real people versus the curriculum's Homo Economicus. Curiosity led me to the topics of behavioral finance and neuroscience to better understand decision-making. Those learnings have become invaluable in my work with teams and coachees.

Now it's twenty some years later and I find myself, once again, on a high-performing team, doing something I love.