



PHOTO BY KARLA WENNERSTROM

Modus staff members are Matt Wright, Julie Kaufmann, Carol Fink and Tad Weiss.

## Modus Advisors opened on notorious day

By Karla Wennerstrom

Modus Advisors opened the doors to a new location in Eden Prairie on March 9, 2009.

"It was the bottom of the stock market, to the day," said business founder Tad Weiss.

Sounds like a tough time to open a financial planning and investment management firm?

"It was quite an interesting time to be moving and to be opening a new company," Weiss said.

"You can never plan these things out perfectly," he said. "Fear is really the word that comes to mind. That was on everyone's mind at that time. ... It just seemed like nothing would stop the slide."

Weiss said that investors experienced a lot of fear, questions and re-evaluating.

"It was definitely a challenging period," he said. Weiss said his clients weathered it well. He said in 2009, most people "went into a bunker," not wanting to look at their 401k statements.

"The dust just needed to settle," Weiss said.

"It's safe to come out now," he said he's been telling prospective clients. He advises clients to rethink their financial goals and plans – and to make sure their investments are "aligned with the new economy we're living

### Modus Advisors

For more information, or to set up a free initial consultation, visit Modus Advisors at 11995 Singletree Lane, Suite 230 (Windsor Plaza), call 952-946-1000, fax 952-946-1010 or visit [www.modusadvisors.com](http://www.modusadvisors.com).

Source: [www.modusadvisors.com](http://www.modusadvisors.com).

in, the new normal."

Weiss, a Victoria resident, had worked in Bloomington since 1994. He founded Modus after 23 years working as a financial planner, according to the business website.

Modus also includes Julie Kaufmann of Eden Prairie, who has worked with Weiss since April 2000; Carol Fink, who joined the firm in 2008; and Matt Wright, who joined in 2009.

The business offers financial planning, retirement planning and fee-based asset management. Weiss said they work mainly with individuals and small business owners from a variety of professions. It is affiliated with LPL Financial.

Weiss, a certified financial planner, said he came to the Twin Cities after attending Gustavus Adolphus. He decided to move to Eden Prairie when he saw that the

Windsor Plaza building was in the works.

"It was mainly out of a desire to move to the Eden Prairie area," Weiss said. He said he plans to get involved in the community. The office took an afternoon off around Christmas to go shopping for People Reaching out to Other People, the local food shelf.

Weiss said the name Modus is defined as "method or manner" in Latin.

"We like to talk about having unique methods," Weiss said. He said new methods are needed to look at the changing economy, and the business likes to emphasize its manner, its customer service.

"You really get brought into the inner circle of a financial situation," he said of working with clients. It can be challenging, but also very meaningful, he said.

"We are optimistic in general, but also very aware of the potential problems out there and making sure our clients are protected if and when the bad events occur," Weiss said.

### A GLICK AWAY

[www.edenprairienews.com](http://www.edenprairienews.com)

Visit our website for a link to the Modus Advisors video, "Rethink Retirement."

Source: Eden Prairie News