

Member of the Month by Ellen R. Cohen

Mary T. Stiles-Hendler

“My clients often don’t have the time or expertise to manage their investments,” says new WBO member Mary Stiles-Hendler, “so we can step in, work with them to find out what they want to accomplish and develop a customized approach to what they need. They don’t have to worry about it. We set up specific steps, put together a detailed plan, monitor that plan, and meet with them on a regular basis.”

Mary is a financial advisor with Morgan Stanley Smith Barney. She and the other three members of her team, the Atlantic Capital Group, work together to meet the needs of their clients. “I am not a stock broker,” says Mary, noting that she “looks at the complete picture of a person’s financial situation and helps develop strategies to accomplish his or her financial goals.”

Savings, investments, taxes, planning for college and/or retirement, and passing on money to heirs all factor into Mary’s wealth management solutions. Her team works with families, professionals, and business owners like WBO women. In addition to working with individuals, she helps businesses get access to credit, set up retirement plans, and otherwise maximize available opportunities.

Like many WBO women, Mary did not instantly find her professional niche, but got there indirectly in a somewhat roundabout fashion. “I did not grow up living and breathing investments,” says Mary, whose college background was heavily weighted towards French, history, cultural anthropology and other non-financial areas. After college she worked in the advertising industry and then as a recruiter for JP Morgan. However, after several years, she “fell in love with the business and decided, ‘This is what I want to do!’”

Mary has been working as a financial advisor since 2006 and has been with Morgan Stanley Smith Barney since 2008. “I have done this throughout the financial crisis!” she says proudly. “I love teaching people how to make their money work for them and demystifying financial issues.”

Believing that it is necessary to develop rapport with clients in order to better understand what they need, she feels strongly about the importance of listening carefully to what clients say. She enjoys interacting with people because “no two days are the same and I love helping people accomplish their goals. In a single day, I may hear from a client who wants to liquidate money to buy an engagement ring for his fiancée or set up a college plan for a new grandbaby. When clients hit a rough patch, it’s also good to know that your skills can help them.”

Because Mary’s business is male-dominated, she joined WBO to meet other smart businesswomen in the community. “If I wanted to meet a network of like-minded women, I knew I had to get out of my office,” she says.

Originally from Florida, Mary enjoys traveling and reading. When she is not working, she is involved in equestrian sports. She rides in Poolesville, MD and loves anything related to horses.

If you have questions about meeting your financial goals, call Mary T. Stiles-Hendler at (301) 664-6864 or e-mail her at mary.t.stileshendler@mssb.com.

Ellen R. Cohen is a free-lance writer and editor whose "editorial advertising" helps her clients advertise their goods and services in a variety of ways. She can be reached at (301) 984-7444.