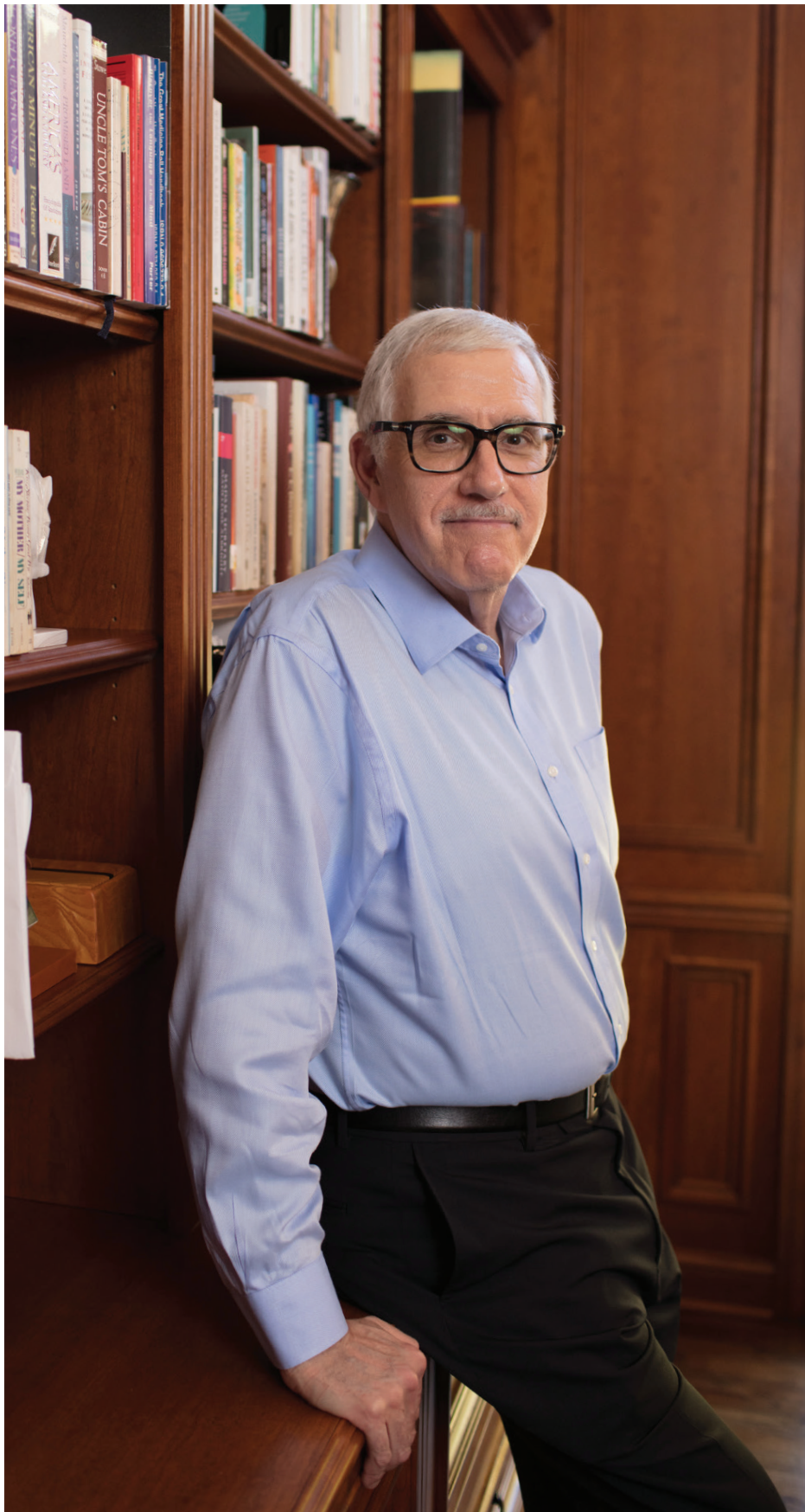


After he stepped back from his role as a business leader, and with his children getting older, Neil and his wife, Debbie, took the opportunity to learn as much as possible about investing. They met with a number of advisors and chose the Private Banking and Investment Group because their private wealth advisor (PWA) understood the client-focused relationship they were looking for.

They continue to work closely together, studying each potential investment in detail. Their PWA has also offered financial guidance to their two adult children, helping to address one of the couple's primary concerns: the passing on of strong values, financial and otherwise.



An engineer by training, Neil keeps his drafting materials close at hand and recently used them to design the office in his home.

Neil Novich

A former CEO, Neil draws on decades of business experience and a lifetime of study to advise companies, nonprofits, even students. But he still has a lot to learn.

Neil makes it his mission to understand everything about anything he's involved in. "There was a lot I didn't know about investing, and it seemed the best way to learn was to work closely with an advisor," he says. His business career and commitment to his family had always prevented him from focusing on his financial picture in more than a general way. After completing the 2007 sale of the public company he was leading, he asked friends to recommend advisors, then he and his wife, Debbie, started interviewing candidates.

"It was important to find people who would work well with our family," Neil says. "Some advisors spend a lot of time talking. Here we found people who wanted to listen, who started by asking us questions and trying to understand our needs."

Because he'll only invest in something he's dissected thoroughly, Neil doesn't just pore over data with his private wealth advisor. They frequently direct questions back to the portfolio managers and others involved in structuring any potential investments. "That's a level of detail most advisors won't go into," he says.

Neil worked as a nuclear engineer and a software engineer before moving into consulting, where he served clients around the world. In 1994, he settled in Chicago to head an industrial company, more than tripling its revenues over the next 13 years.

Investing in people was one of Neil's keys to success as a business leader, and for the past decade he's continued to do just that, sharing his expertise with those in the business, academic and nonprofit worlds. He serves the

University of Chicago in several ways, including judging pitches from budding entrepreneurs in its graduate business school. He's also a trustee of the city's Field Museum. Belonging to the boards of four companies lets him consult with business executives and fellow board members about a range of issues.

"I've sat in those chairs and made those decisions, so I understand what the executives are going through," he says. "I also get to work with people who are knowledgeable and dedicated, and I learn a lot from them."

Several hours a day of focused learning — about business, economics, technology (a lifelong passion) and other subjects — satisfies his curiosity and helps him keep up with the relentless pace of change in our society. "You've got to devote a certain portion of your time to continuous learning, not just to help you in your everyday life but in your financial life and career," he says.

Neil and Debbie have two grown sons, and they've spent a lot of time thinking about how parents instill values in their children. "You want to make sure they know how to treat people, that they become productive members of society, that they understand the whole world's not about money." The couple believes living your own values day to day has the greatest influence. "They're really listening and watching when you're just living your life, and they absorb everything."

With a portfolio of pursuits to occupy him and — thanks to technology — a world of knowledge at his fingertips, Neil will continue learning as much as he can about the things that excite him. "I've always got something I'm focused on. I'm constantly learning more."