

# TACKLING FINANCES – THE TEXAN WAY

**Sara Pantin**, Managing Partner, Asset Strategies Group

*Sara Pantin, a proud Texas native, made her way back home to impart her independent attitude and financial savvy to both family and clients of her financial services firm.*

Story by S. Kay Bell | Photo courtesy Sara Pantin

INDEPENDENCE IS HARD-WIRED INTO every Texan. That's why it's no surprise that Sara Pantin, a proud sixth-generation Texan, has taken her natural affinity for doing things her way and made a successful career out of helping others achieve their financial independence.

Pantin is managing partner of Asset Strategies Group, LLC, an Austin firm she co-founded three years ago with Bill Olsen.

Executive women in the financial services sector, while still under-represented, are not quite as unusual these days, thanks in large part to Pantin and her female peers. But when she made the decision 30-plus years ago to explore the financial and accounting worlds, Pantin was a trailblazer.

Back then, though, she wasn't intentionally staking out new workplace territory for herself and other women. "For me, it was quite by accident

while in college," she said, sitting in her northwest Austin office filled with state mementos, from a huge Republic of Texas map to Austin festival posters to her Native Texan certificate. "I started out as an English/Spanish major. I had an uncle who was a college professor and early mentor, and he was threatening to send me to Spain for an immersion program. But I couldn't figure out what I'd do with that type of degree."

Then she noticed the fraternity boys she was dating at Southwest Texas State University (now Texas State University; Pantin also continued her financial studies at the graduate level at The University of Texas in Austin) were studying accounting and finance. "I thought, 'Hmm, that looks interesting,' that I might actually make a living at that," she said.

And she did. In the '70s, balancing life as a young wife and mother,



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Pantin went into banking. When she later became a single parent, her financial interests became more than just a job.

"I realized then I needed to be in a position to earn what I was worth and I had that drive to be financially independent," she said. Pantin moved from banking to insurance - she holds the professional designation of Chartered Life Underwriter (CLU) - and in 1984, into the broader financial planning sector. While that progression was a wise career move, it had one big drawback: "It took me away from my beloved Texas."

With her new husband agreeing to put his career second to hers, they headed west in 1993, ending up in California's Silicon Valley. She was a senior executive for a major insurance and financial services company at a time when women accounted for less than 5 percent of senior management.

The corporate and geographic change opened up a new world for her.

"I was definitely a country girl in that big valley," said Pantin, who counts two small Texas towns, Luling and Gonzales, as home. "It was quite a heady time. I arrived just at the beginning of the tech boom, so I got to see the boom and the bust."

She also benefited, she said, "from things you can't really put on a résumé, from things that I wouldn't have experienced in my lifetime in Texas. I had agents working for me from all the major cultures."

For a decade, she stayed the California course in the "dull and boring" financial services industry, watching it steadily grow as the tech sector lost its luster. But on a personal level, the Golden State also was losing some of its gleam for her.

Two things were drawing her back home: The desire to run her own financial services shop and family.

As Pantin speaks proudly of her past, of ancestors who were Texans before Stephen F. Austin arrived and long before the land was a state or a republic, any Texan, new or old, native or transplant, can appreciate the power of the call back home.

But Pantin had even more reasons to return to her roots. Her eyes literally light up when she talks of her grandchildren, the two granddaughters and grandson she calls her "eighth-generation Texans." Like any good grandma, she'll happily show you the photographs that join the Texas memorabilia in her office. And now, back home near the youngsters, she doesn't have to rely just on those snapshots.

"When [they] announced in 2002 that a grandson was on the way, I thought 'I can't do this anymore,' the flying back-and-forth. One of the best decisions I made was to have more balance in my life and step off that corporate ladder," Pantin said of the decision to return to Austin. She did give her California employer the opportunity to retain her, but on her terms. "They wanted me to go to Dallas and be more corporate. I said, 'Thanks, but no thanks. I want to

be in Austin.'"

While the move was for what Pantin called "the right reasons, to get more balance and put family a little higher up the pedestal," she also knew that she was definitely not ready to retire to the rocking chair.

So in 2004, she and Olsen opened the doors of Asset Strategies. "We had known each other since 1987, but never worked in the same office. We'd both run very large corporate offices, we shared the same visions and values," said Pantin. "We reconnected back here and realized that we wanted to exercise our passion for independence, build our own company, do it our way. There's nothing better than being able to come back home to do what you love, where you love and with the people you love around you."

And, just as she hoped when she returned to Texas, her business goal meshed nicely with her personal ones. "It all really comes back full circle in the type of work I do, helping women, men, families and businesses leave a legacy," said Pantin. "I think that's what we'd all like to do." ★

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