

RODD NEWHOUSE, EJD, AWMA®

ABOUT RODD



Rodd Newhouse is a Wealth Manager with 44 management and focuses on managing wealth for private clients with a concentration on sports and entertainment professionals. He holds an Accredited Wealth Management Advisor (AWMA®) designation which allows him to help his clients capitalize on opportunities to preserve, grow, and transfer their wealth.

In 2017, 44 management aligned with Wealthcare Advisory Partners to provide clients with a goals-driven experience that seamlessly integrates planning and investing.

Background and credentials

With more than 20 years of experience in the sports industry and extensive experience with investment services, Rodd has built a Sports and Entertainment Advisory practice. He comes from a family of multiple NFL players, which gives him insight into the unique wealth management needs of professional athletes and entertainers.

Rodd learned early on the value of money management and brings that knowledge to each client relationship. He works with clients to identify their financial and life goals, develop a personalized budget and create a long-term financial plan that synchronizes client goals with investments.

In 2011, Rodd joined Wells Fargo to expand his Sports and Entertainment Advisory business. Before this, he was the Pro Personnel Director for the Arizona Cardinals. Prior to the Cardinals, Rodd worked for the NFL Management Council. After graduating from Rice University with a bachelor's degree, Rodd signed with the Baltimore Ravens. He also earned a Juris Doctor (JD) degree from Concord Law School.

Personal Interests

Rodd is married with two children. He is a member of Association of Rice University Black Alumni and is speaking advocate for the American Heart Association. He is also the co-founder of the 44Strong Foundation, a non-profit which raises awareness for amyloidosis (heart disease) research which was started to aid the legacy of his father, Robert F. Newhouse, Jr., a former Dallas Cowboys fullback and Super Bowl Champion.

The Five Ground Rules

- 1) This is your money and I always remember that. My responsibility is to advise you on the employment of those monies for any given situation or goal. Mutual respect shall be given to both.
- 2) I tend to ask numerous financial questions. It helps me to help you. If you ever feel uncomfortable answering a question I have asked, feel free to let me know. I respect your privacy.
- 3) If there are any costs or expenses involved with anything I recommend you do, you will always know those up front. I like for my clients to have good surprises, not bad ones.
- 4) You can count on all correspondence, either oral or written, being held in the strictest of confidence.
- 5) If it is deemed appropriate by all parties that you entrust your financial future to me and my firm, I will make but one promise:

I will always do my best to have a solid T.R.A.C.K. (Trust, Respect, Accountability, Credibility, Knowledge) record with you!

*Rodd Newhouse, EJD, AWMA®
Wealth Manger*

44 management

Service for Friends and Family

Rodd Newhouse, EJD, AWMA®

Wealth Manager

As a service for our clients, we make ourselves available as a sounding board for any friends or family members. When someone you care about needs financial guidance, we will make time to meet with them and point them in a helpful direction.

How can we help?

As financial stewards, we always want to make ourselves available as a sounding board to those you care about – even if it is to confirm that they are on the right track. That is why we have created a service for friends and family.

How to access our service

Step 1

- If a situation arises where an individual may need assistance with a financial matter such as retirement planning or investing, you are welcome to share with them your experience in working with our practice

Step 2

- Ask the person if they would like to meet us – and with their permission, call our office to provide us with their contact information
- You may also, with their permission, share any high-level information that may be helpful

Step 3

- We will call them to introduce ourselves and talk briefly about their needs
- We will send them an introduction kit about our practice and then call to schedule a meeting or phone conference
- The purpose of the meeting is to gain a solid understanding of their goals, objectives and current situation so we may provide them financial guidance
- Following the meeting, we will determine what are next steps
- We will answer any question that we can. We may also direct them to other resources as necessary
- If they need ongoing assistance, we will mutually determine if we begin a working relationship

We are here for you and anyone who you may need guidance with a financial situation. You are always welcome to call us.

44 management

Professional Sports & Entertainment Advisory

44 management understands Sports & Entertainment professionals live in a very fast-paced world filled with many different types of risks and opportunities and face a special set of circumstances that require a unique set of financial strategies.

THE CHALLENGE:

- Save the necessary amount to fund and sustain a retirement, which has no guarantees on long term employment.
- Make the appropriate decisions about investments and savings while trying to manage a professional sports career.
- Manage personal relationships and deal with pressures from family, friends, and lifestyle.
- Manage a plan where the factors can change at any time; location, income and goals are constantly changing.

OUR SPECIFIC EXPERIENCE TO ANSWER THE CHALLENGE:

- Identify goals and objectives.
- Implement and execute a personalized plan.
- Make necessary adjustments.
- Finish strong.

“Once you figure it out, you will be out of the game or too old to play.”

~Tom Landry

Combining the investment management experience with the professional sports industry heritage and insight, we have built a team specifically to identify the needs of sports professionals, entertainers and their families. We look forward to serving you!

44 management

What does a financial advisor do for me?

Simply stated... "We strive to be your trusted personal advocate."

We are who you come to with financial questions when you need answers.

What kind of questions do you have?

- "How does my retirement plan and benefits affect me?"
- "Should I pay cash for my house or get a mortgage?"
- "I am with a new team now! How do I get my car and personal belongings from California to my new city?"
- "Do I need a will? I have concerns about estate planning strategies and how they affect my investment plan? Where do I start? What questions should I have before I visit my attorney?"
- "My buddy wants me to invest in a great new business concept. Your thoughts?"
- "I want to start my own business. What are common business structures and how could they affect my financial future?"
- "How much money will I need to live on after my playing career to maintain my current lifestyle?"
- ... and the list goes on and on

Services tailored to those in the Sports & Entertainment Industry

- Real life experience from former pro athlete, sports executives, and entertainers
- Coordination of tax and legal advisors affecting your financial future
- Cash flow analysis to assist you in overseeing costs and budgeting, marketing services, training, endorsements, non-profit/charitable activities and foundations, real estate transactions, review of private investment opportunities.
- Investment planning strategies tailored to the unique goals and circumstances of those in the sports and entertainment industry.

Access to Lending and Banking Services through Affiliates

- Budgeting, Bill pay management
- Help address family financial management issues
- Beneficiary designations
- Coordinate with Legal Advisors to assist in establishing Power of Attorney (POA), if necessary
- Short-term asset management and money market investments

Investment Management and Planning

- Investments management
- Investment and lifetime event planning
- Access to a vast array of investment products and services such as retirement planning services, stocks, bonds, mutual funds, life insurance planning, 401(k) oversight, annuities, pension plans

44 management

A PENNY DOUBLED FOR 30 DAYS

1/1/18	\$0.01	
1/2/18	\$0.02	X 2
1/3/18	\$0.04	X 2
1/4/18	\$0.08	X 2
1/5/18	\$0.16	X 2
1/6/18	\$0.32	X 2
1/7/18	\$0.64	X 2
1/8/18	\$1.28	X 2
1/9/18	\$2.56	X 2
1/10/18	\$5.12	X 2
1/11/18	\$10.24	X 2
1/12/18	\$20.48	X 2
1/13/18	\$40.96	X 2
1/14/18	\$81.92	X 2
1/15/18	\$163.84	X 2
1/16/18	\$327.68	X 2
1/17/18	\$655.36	X 2
1/18/18	\$1,310.72	X 2
1/19/18	\$2,621.44	X 2
1/20/18	\$5,242.88	X 2
1/21/18	\$10,485.76	X 2
1/22/18	\$20,971.52	X 2
1/23/18	\$41,943.04	X 2
1/24/18	\$83,886.08	X 2
1/25/18	\$167,772.16	X 2
1/26/18	\$335,544.32	X 2
1/27/18	\$671,088.64	X 2
1/28/18	\$1,342,177.28	X 2
1/29/18	\$2,684,354.56	X 2
1/30/18	\$5,368,709.12	X 2

Note:

It takes 8 days to break \$1

It takes 25 days to break \$100,000

In 5 days the penny grows from \$167,000, possibly enough to buy a reasonable house, to over \$5 Million, more than enough to retire for the rest of your life on \$250,000 a year.

43,252,003,274,489,856,000

Source: Scott Vaughn, Professor of Mathematics, Miami Dade College North Campus