

MyMurrieta

JAN
FEB 2015

MAGAZINE

A man in a dark suit and patterned tie stands behind a woman who is seated in a black leather armchair. The woman is wearing a black blazer over a white top and a long necklace. They are in a bright room with large windows overlooking a landscape. A round wooden table with a potted plant is in the foreground.

**Providing
for Family,
Finances,
and Future**

YOUR TAXES | PRIMAL CRAVINGS | LIBRARY NOTES

The Duane Johnson Group Providing for Family, Finances, and Future.

**“Recognized
by Forbes
Magazine
as one of
America’s
Financial
Leaders!”**



By Mike Broemmel

At the age of 32, Duane Johnson laid in a hospital bed contemplating how he would continue to support himself. After a failed kidney transplant in 2000, Duane was spending 3 days a week on dialysis. The uncomfortable treatments lasted seven years while he awaited another kidney. As Duane contemplated his situation, he realized that it was absolutely necessary that he start his own business if he wanted to continue working rather than living life on disability.

Thus the Duane Johnson Group, a financial, retirement and income planning business, was literally started from his hospital bed. How impressive that 14 years later, in April, 2014, the Duane Johnson Group was recognized by Forbes Magazine as one of “America’s Financial Leaders!”

Hailing originally from Montana, Duane did not come to California with the idea of starting and running his own financial planning company; rather, his deep desire to be independent and successful gave him purpose. Just four years before Duane’s kidney transplant failed, he had been introduced to the financial and insurance industry. “I knew I couldn’t hold an eight to five job,” Duane explained. “I had lots of experience in this industry to fall back on. So, I decided it was now or never to start my own business.” Soon, he began conducting seminars and seeing clients between his treatments.

While his clients were often much older than he, Duane was able to identify with them in their need for financial stability and to make sure that their families would be financially secure should they pass. The fact that he could relate so well to his clientele through his own

uncertain situation really put him in a position to lead by example and to advise. Duane never realized that his health challenges, would give him such insight into planning for the unknown.

Since its inception, the Duane Johnson Group has been dedicated to establishing meaningful relationships with its clients. These types of connections require time and focused dedication. Although his medical problems presented a challenge for him during the early years of his firm’s operations, Duane’s attentiveness to clients, quickly made him stand out amongst his competition.



Duane’s wife, Laura, was amazed to see him so focused on his business and impressed by his ability to be so positive during those trying years when he was on dialysis. She always gave her full support to him and the business. Trust is such a key component of any financial business, so it was just natural that Laura stepped in as the office manager when the company started. Laura has taken on many roles over their 14 years in business and one of the biggest is marketing through community outreach. Putting on free educational seminars in the community has been a great tool to help people of all ages understand retirement and financial planning.

Early on, the Duane Johnson Group developed the Retirement Financial Boot Camp as a resource for people in need of effective, tailored strategies for their golden years. The Boot Camps provide comprehensive information and resources for people who are retired or contemplating their retirement. These include strategies designed to assist with:

- Retirement planning
- Income planning
- Tax planning
- Risk management

The Boot Camp seminars have been widely received in the Inland Empire since Duane started them in 2000. The Duane Johnson Group as a team, have a considerable depth of experience and knowledge in regard to financial and retirement planning. Seminars attendees have reported that they felt more in control of their futures once they understood what needs to plan for. This is the start for many in developing their own personalized financial, retirement, and tax planning strategy.

By providing this free resource to the community to assist them in planning for the future, the team is able to educate and answer specific questions. This is the foundation on which trust is developed with individuals over time and without pressure. Seeing how things are done first hand and being involved in the process has led many attendees to become clients of the Duane Johnson Group.

The financial and retirement planning industry is highly competitive. This is particularly the case as Baby Boomers are entering their golden years. The Baby Boomer generation is proving to be the largest number of men and women in retirement than at any point in U.S. history. There are many finan-

cial and retirement planning outfits vying for a portion of this aging market niche. It's comforting to know that one of "America's Financial Leaders" is right here in Murrieta!

In discussing with Duane what makes his business stand apart from so many others he related that developing a personal rapport with each client is the key to the firm's success. "I would not want anyone to feel like a number," he explains. Besides Duane, the firm boasts other well-trained professionals, each of whom delivers the same personal service that has become the hallmark of the group. In addition to Duane and Laura, the firm includes two independent agents, as well as a tax specialist. "The goal is to provide customers with comprehensive, reliable services available from one location," explains Laura. "We are always looking for ways to provide more for our clients to add value."

In 2014, the Duane Johnson Group hosted their first annual "After-Tax Party" at the South Coast Winery Resort and Spa.

Duane believes it's important to show his appreciation to his clients and to interact in a more informal setting. He believes this really strengthens the connection between the clients and the professional team. After the terrific feedback on the event, the group decided to make it an ongoing tradition. Building these personal connections with clients is fulfilling to everyone on the team.

The drive to live life on his own terms combined with a high degree of integrity have been the key components in Duane's business success. He made the choice to act 14 years ago rather than allowing his health issues to set the course of his life. In doing so, he did not just build a future for his own family; he helped numerous others build a healthy financial future for their families as well! The Duane Johnson Group is looking forward to helping many more of their Murrieta neighbors prepare for the future in 2015!

