For Greg Sarian, it’s always been about the client relationship. “It’s far more interesting than the numbers side of things and it remains as such,” he says. “What brought me into this business is a love for people and to truly be a servant.”

Sarian, 45, heads a team that works with 135 households—many of them high level executives in the life sciences industry in greater Philadelphia. His leadership style is informed by what he calls a “servant mentality” that pushes him not just to do but to give.

“How can we elevate the client experience? That’s what drives us. We want to become a part of the client’s life that goes beyond the business relationship,” says Sarian, whose group manages $600 million in assets. “We want to serve.”
At his core, Sarian is both a servant and a leader.

As Russ Cadle, president of the non-profit Friendship Ministries Foundation, observes: “He is so authentic and so committed to excellence. He is constantly thinking about how he can improve his business, help his colleagues, serve his clients. He’s very faithful about supporting people. There are givers and takers in life. He’s just a giver.”

Sarian was hired right out of college into Merrill Lynch’s training program in 1992. “I worked nights, weekends, I was so afraid of failing. Merrill gave me a great start and opportunity,” says Sarian, who left his longtime corporate home for High Tower in 2013. “Early on, I got a sense from advisors 10 and 15 years ahead of me that this is a helping industry and if you work hard and you work smart you can really build a career.”

Sarian, a certified financial planner, experienced early success by conducting tax and estate planning seminars with accountants and attorneys. “I was never a stockbroker,” he says. “I’ve always had a financial planning mindset.” He also developed a niche serving corporate executives in the emerging biotechnology, medical device and pharmaceutical fields with his core competency in pre- and post-exit planning. Today, that niche represents half of his client base.

It’s an interesting cast of characters. One client pioneered a hand-held medical device that detects concussions early. Another is working on a device that will treat everything from arthritis to post-surgery pain. Still another developed a compound that gets rid of head lice more efficiently.

“These are some of the most educated, intelligent, intellectual professionals I’ve ever met. They think and analyze at a different level. They pour their hearts and souls into their companies. They are entrepreneurs at the core, and they eat, sleep and breathe their businesses,” says Sarian, who leads all financial planning efforts with an emphasis on executive compensation, risk management, tax minimization and wealth transfer planning.

“They lack the time and inclination to look at the entirety of their financial world and put a game plan together. They see the same integrity, passion and focus in what I do as what they do. They want somebody as talented and skillful and hardworking as they are watching their money. While they’re running their businesses, we’re watching their money,” adds Sarian, who has a bachelor’s degree in economics from Boston College. “We’re their personal CFO.”

That’s the doing. Here’s the giving. Every quarter, Sarian headlines an executive briefing on topics to help clients grow their businesses. He also distributes research reports that are relevant to their work—what big pharma is doing in diabetes research, for example. And Sarian, active in the Pennsylvania Biotechnology Association, routinely holds conference calls and webinars to keep life sciences clients informed about what is occurring in their marketplace.

The Sarian Group also hosts an annual “shred day,” when clients can bring paper to a shredder in the firm’s parking lot and then have lunch. Just recently, Sarian introduced a program to connect with his clients’ children—talking to them about saving, investing, budgets and credit cards. His concierge service currently offers a menu that includes an identity theft protection program and a nutritionist who makes home visits to help clients map out healthy food choices. In the works: SAT counseling for clients’ kids.

“Our demographic is slightly younger. There are a lot of 40- and 50-somethings busy running companies,” says Sarian, who has been included for the past four years in Barron’s list of the top 1,000 advisors. “So we are constantly asking: What does that demographic need and want? And we’re more concerned with quality than quantity. We’ve never been interested in volume. We want to be many things to a few people. Yes, we are a for-profit business but our goal has always been to develop a very deep relationship that becomes a meaningful part of the client’s life. It all goes back to the relationship. That attitude has brought us whatever success we have achieved.”