Drew Besonson

Northwestern Mutual – Troy Director of Estate & Business Planning

Future financial circumstances depend on sound fiscal decisions today.

In order to make confident decisions about the future, today's most successful wealth-holders need a different kind of advisor. They often find themselves with a variety of strategies in place that were brought to them by different advisors at different times, resulting in a mix of different ideas.

Drew Besonson, a Troy-based wealth management advisor and director of estate and business planning, helps his clients clarify their broader vision for their wealth by working to understand their values and goals. Besonson has made it his career to enhance and help clients achieve their financial goals by applying the pillars of financial planning and then providing each client with a written financial plan. "I get excited when I can inform, educate, and advise successful people. I find great satisfaction in what I do," he says.

"There are concerns that everyone in the financial world has, and nobody likes change," Besonson adds. Even so, he recognizes that change is a given in his business. Besonson's team builds and implements financial plans with a clear understanding of each client's personal, business, estate, and trust needs. His strength is in listening to clients, learning about their desires for the future, and integrating their hopes and dreams into the planning process.

Besonson's approach involves creating a team environment that's centered on a client's core values. This requires collaboration with other professionals, including the client's current advisors, to assure an inclusive planning process.

"We provide insight and education regarding many questions, such as how to move assets throughout multiple generations in the most tax-efficient manner," Besonson says.

Many types of trusts are used to achieve particular goals. One specific type of trust used for wealth transfer is a domestic asset protection trust, or DAPT. Besonson says Michigan just became the 17th domestic asset protection trust state — a notable matter in estate tax planning.

Besonson's enthusiasm for his chosen field is matched only by his dedication to ensuring that his clients receive the best financial advice and service. As a wealth management advisor with Northwestern Mutual, he's able to provide an entire marketplace of products and resources. "Our clients tell us they receive great comfort and confidence knowing we're continually anticipating and thinking about their potential needs," he says.

Besonson's passion for helping others includes working with local nonprofits. He serves as a board member of Orchards Children's Services, which provides critical services related to family preservation and adoption. He also actively serves as a Beaumont Health Foundation trustee, with a special interest in the Neonatal Intensive Care Unit. Because of his commitment to these programs, Northwestern Mutual recognized him with a Community Service Award for 2017.

A Pennsylvania native, world champion horseman, and graduate of the University of Michigan, Besonson enjoys living in metro Detroit. His practice is dedicated to providing trusted advice, peace of mind, stability, and security.

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