



## Q&A with the WRP partners

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### Q: What was your childhood like?

**Aaron:** I'm from a small suburb of Chicago called Buffalo Grove. It's about the same size of Pleasanton, which is where I live now. I grew up on a street where there were tons of kids always playing outside, it was about as American as apple pie. We lived right behind a huge park, and my younger sister and I spent tons of time kicking around soccer balls, riding bikes, and doing everything a kid should do. Of course, growing up in the 1980's, I was an avid Nintendo player. My parents still live in our childhood house.

**Jason:** I grew up in Santa Clara Valley before it became known as Silicon Valley. The area in Sunnyvale I was raised in was comprised of "starter homes" flanked by remnants of old orchards. Full of young families, there was always a game to play and fun to be had. I developed tight friendships based on common experiences and have great memories to this day. In fact, I'm still close friends with several boys I went to kindergarten with! By the way, those former "starter homes", now have new neighbors: LinkedIn, Microsoft and Apple. How times have changed.

**Alan:** Life was very idyllic growing up in Baltimore in the 1950's and 60's. Children were allowed to move about their neighborhoods freely without a parent accompanying them. I knew virtually every person who lived within two blocks of my house in any direction. I could always be found with a ball in my hands as I was totally hooked on sports. When I wasn't playing sports, I would be listening to or watching an Orioles, Colts or Bullets game.

### Q: What is your family like?

**Aaron:** For those who don't know, my father-in-law is Alan Werba, one of the other members of the firm. I'm married to his daughter, Libby, and we have three daughters Natalie (seven years old), Gwen (six years old), and Emmy (four years old). We have an English Bulldog, Daphne who will be eleven years old in January. My extended family still all lives in Chicago.

**Jason:** My parents still live in the home I grew up in and my only brother and his family live nearby. My wife, Susan, grew up in San Francisco with 4 other siblings. Her parents still live in her childhood home and all of her siblings are in the Bay Area. My two sons, Finnegan (ten years old) and Sawyer (seven

years old) have 8 cousins in the area. It's one big happy family and we all get together frequently for birthdays, holidays, or just to spend time together.

**Alan:** Until I left for college, my parents and two sisters lived in a small house in a Jewish neighborhood in Baltimore. My father owned a TV repair business and a Magnavox franchise. We ate almost every dinner together as a family and every Friday night we were expected to be at my mother's parents' home for Shabbat dinner that also included my cousins. As the only male child in the family, I was treated like royalty – something I really did not merit. We had many aunts, uncles and cousins living in close proximity and everyone dropped by to visit without feeling a need to call ahead. We also drove seven grueling hours each way to Hartford, Connecticut each year to visit my father's parents. I loved my family as a child and I still visit and stay in touch with most of my cousins even though they live predominantly on the East Coast. Today Pat and I are very involved in the lives of our two daughters who live in Pleasanton and Mill Valley and our three granddaughters in Pleasanton. They are the joys of our life.

### Q: What are your hobbies?

**Aaron:** Sadly, I've never grown up. My middle daughter is really into video games, so I play a lot of Wii and 3DS with her. My other kids like wrestling, which I did in high school, so I'll break out my moves when needed. I also volunteer in the community: I was a soccer coach for two youth soccer teams last year, and recently completed a stint on my synagogue's board.

**Jason:** With two young boys much of my time is spent at their basketball games, hockey games, golf lessons, or other extra-curriculars. My wife and I also enjoy trying new restaurants on our "date night" each week. My non-family time is spent mostly volunteering. I'm currently the Board President for the San Jose Public Library Foundation and I take time to support many other non-profits.

**Alan:** I am a workaholic, so I tend to work long hours. My relaxation consists mostly of golf, travel, volunteerism and family gatherings. Recently my wife Pat and I have gotten hooked on Warriors basketball and rarely miss watching a game.

### **Q: How did you get into wealth management?**

**Aaron:** I blame Alan Werba! I met my wife, at the end of my second year of law school. The first time I met Alan he handed me the book he wrote “The Prudent Investor’s Guide to Beating the Market.” I poured over it, and in four days I was converted. I also saw the impact Alan made on his client’s lives; I paired that with the fact he actually had a life outside of work, and decided that was what I wanted to do. I’ve been doing wealth management for nine years, and have never looked back.

**Jason:** I had been working in corporations but was not fulfilled with the work I was performing. I talked to the CFO and told him instead of corporate finance I thought I might enjoy personal finance. He replied

that if he had it all to do over again, that’s what he would have done. So I enrolled in night classes to study personal finance and immediately fell in love with it. I asked one of the professors if I could intern for him and fifteen years later I still love what I do.

**Alan:** In fourth grade I was introduced to graphing stock market performance and this exercise truly ignited my love for investments and finance. So when Carl Reinhardt asked me to expand my CPA practice by helping him launch a financial planning firm in 1977, it seemed like a logical adjunct to my tax-oriented career path. John Bowen joined Carl and me two years later and the three of us ultimately developed our current investment program utilizing the DFA asset-class funds in 1990. Looking back, it’s been both interesting and very rewarding.

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