

# The Freedom to Put Your Clients First

Michael Derby: Independence is so important in our business. If you're in an environment where you have sales goals, or quotas, or specific products that there's supposed to be a focus for your business, you're losing sight of the client. And the client needs to remain number one.

Val Cattelan: It's important to have a dealer that recognizes that what we are doing is something far beyond just putting together portfolios, but dealing with client life issues, issues around education, issues around risk management, life insurance\*, disability\*, critical illness\*, estate planning issues.

Michael Nott: The client is at the tip of the spear, the most important thing. And if you align all of your processes, all of your programs, all of your technology, and if you empower that entrepreneur to be able to deliver best service to the client, then everybody wins.

Alex Preswick: I got into this business to help people. Being independent allows me to focus on the client first, allows me to listen to their concerns, not worry about how much time I'm spending on them. It's about the client first.

[End of recorded material]



INVESTED IN YOU.

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