

We Have High Regard For Independent Professional Advisors

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Over the last 15 - 20 years, there has been a dramatic shift in how many successful business owners and families with wealth, access and engage financial, legal and tax advice. I am sure everyone receiving this e-mail has noticed.

Some major financial institutions have established broadly based advisory groups within their walls in an effort – quite successful, it seems – to attract, control and retain assets under management. It is now possible to have trusts and wills drawn, tax returns completed and filed, to purchase life insurance and annuities, and even to arrange business valuations without having to meet with an independent professional advisor.

Not everyone thinks this is a great way to do business.

We believe that clients are best served by independent professional advisors working in concert, as a team for the best interests of the client. When legal, tax, accounting, and financial product decisions all come from the same enterprise, we believe something is lost.

We welcome the second opinion of our clients' other advisors who may disagree, on occasion, with our advice or choice of product. The key to us in a long term relationship is that the client is able to make a well informed decision. That means he or she will have contributions from other independent advisors who have no interest in the product.

We view our work as serving on a team of independent advisors who have only one real interest – the client's. Like the professionals with whom we have the opportunity to work, there are no quarterly sales objectives, no "points" for one product or another being placed, just well served clients with the best possible outcomes.

In our business, almost all of our new clients are referred by other professional advisors who have seen our work and appreciate our commitment to serve the client. In this important respect, we are coming from the same place as other professional advisors who value their independence and are similarly committed to their clients.

The team approach, in my opinion, is the superior business and advisory model for the client. We will continue to recommend our clients seek advice from their valued independent professional advisors.