



Supporting Independence

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J.W. Cole News

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A Day at the Office

Vanhorenbeck Group Visits the J.W. Cole Home Office



The J.W. Cole Home Office met with one of its top producing groups, the Vanhorenbeck Group, on Tuesday, June 14th. We spent the day discussing how J.W. Cole will help them adapt to the changing financial services industry and how the Advisor Solutions team can help them thrive as business owners.

J.W. Cole leaders, RJ Wood and Craig Towle, emphasized on the importance of assessing the business from a business owner's point of view, rather than solely through the Advisor's perspective.

"Now, more than ever, is the time to assess your business," said Wood. "It's not going to be easy, but if we make the right investments and help you diversify as an overall business owner, it'll be well worth it."

The J.W. Cole Advisor Solutions Team was created to help Advisors do just that: Build Better Businesses. Vanhorenbeck Group leader, Mike Vanhorenbeck, also highlighted how essential this concept will be for his team in the long run.

“Out of everything we are going to talk about today, that (Building Better Business) is the most important thing we can discuss.”

Using the new Advisor Solutions Methodology, J.W. Cole Financial is able to help guide Advisors in reaching their business goals by defining the ultimate **VISION** for the company, then developing the best **STRATEGY** to make it happen and finally, **IMPLEMENTING** that strategy into the everyday business model.

Advisor Solutions Methodology



Though various consulting methods, Advisor Solutions is able to sit with the Advisor and dissect any of the following **Seven Key Focus Areas** where significant improvement is needed.

Teaming & Technology

Marketing & Planning

Client Experience

Recurring Revenue

Recruiting

Practice Acquisition

Exit Planning

More than anything, this meeting emphasized that the day-to-day operations of satisfying the client's basic needs will no longer be the essential component of a successful financial services business.

Advisors will need to mass customize their products and services in order to swim and not sink.

“Business models ran on products rather than service will die out and we need to survive that,” said Craig Towle. “We absolutely cannot stick with familiar problems to escape uncomfortable solutions.”

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