



# ACCELERATOR #2

## MANAGERS PEERS AND MENTORS

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**DANIEL KRATOCHVIL**  
SENIOR COMPLIANCE OFFICER - KNOWLEDGE FIRST FINANCIAL INC.

“Aligning yourselves with good managers and good peers is also another way to gain insight into another area that you might have interest in as well.”



**ZHEN LIU**  
SMALL BUSINESS ADVISOR - TD CANADA TRUST

“Insightful knowledge is not just from the books, it is from also the conversation with the people actually doing the job.”



**SUSAN O'BRIEN**  
VICE-PRESIDENT AND SENIOR WEALTH ADVISOR - BMO NESBITT BURNS

“In order to be successful you learn from other successful people. So one of the best aspects of being with a firm with there is enough people is that you can learn from those people. So meeting with them, talking about their businesses, their practices, how they became successful, was invaluable.”



## SIMON PARTINGTON INVESTMENT ADVISOR - RICHARDSON GMP

“I think a lot of that is finding a mentor, finding someone who has done it before, finding someone you get along with, or that you found a connection with. I met with my branch manager who was the one that hired me, and so I first came on, and I said, “i want to know who is the largest advisor here. Who has the best practice; and who has the best market.” And by the end of probably my second year being there I had met with all of the partners within my branch, analyzed kind of how they do business, what they did to get them to that place. You read a lot of books. You take courses. So it’s just a matter of trying to build out how other people have come successful. And then mirroring certain aspects of their practice into your own.”

