



ACCELERATOR #8

TREAT EVERY CLIENT LIKE THEY ARE YOUR ONLY CLIENT

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CSI Canadian Securities Institute
Moody's Analytics Training & Certification Services



GUS MUND

REGIONAL SALES REPRESENTATIVE - AGF INVESTMENTS

"I take every client as my best client. You know, I focus in on that client with a 100% effort and focus has to be that client at that moment is your best client. You know, I have always heard this this 80/20 rule, you're 20% of your clients will be your 80% of your producers. That's great, but you know what? You still have to service every client like they're your best client and if you do that, you're going to create a brand for yourself. You're going to create a brand where people are going to go out and say, that that guy took the time to deal with me, and spent an hour on just explaining what a credit card was; and that's what I've done, whether I was an advisor back at TD Canada Trust, I took the time to explain it, whether it was a checking account investment, whatever it was, you take time. You respect the client. You respect their time; and you understand that they're coming to you because they trust you, and that level of trust is very important."



SIMON PARTINGTON

INVESTMENT ADVISOR - RICHARDSON GMP

"It's also just being there for everything. It's not just about that portfolio. It's not just about, maybe, an insurance policy, but it's also - I have a lot of clients call me - And they're looking for just general advice, it could be on purchasing a car, or it could be, you know, I'm thinking about, can you talk to my kids about getting into the financial industry, or what should they take in university, or, you know, just different concepts, that could come up randomly. So it's just about being there in a supportive way, almost like a partnership."



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“When you’re able to take the time with every single client, and let them know that you really care? I guarantee you are going to create a picket fence, if you will, with that client. They will never leave you, because they know that you spent the time when it wasn’t really necessary, for yourself. Alright? And that really becomes your brand. It becomes: you’re detail oriented; you take time with every single client; and that becomes your brand.”

