

# An Inside Perspective:

## Ellen Donahue, Associate, Creative Financial Group



**Ellen Donahue**  
Associate  
Creative Financial Group

*I want to share with you why I believe now is the best time to consider a career with Creative Financial Group.*

Even if you are new to this industry, the level of support and expertise that is available to you ensures you are never alone. The focus CFG puts on furthering your career is definitely unique in this industry.

They understand that in the long run, what you learn will allow you to be more successful and will bring more value to your clients and to your own practice. Joining CFG was the best professional decision I have made.



*After climbing the corporate ladder in the banking industry, I knew I wanted to transition into a career in Financial Planning. Finding a company that was the right “fit” was extremely important to me.*

I wanted to work with people who are motivated to help others and an agency that was unique and offered significant growth opportunities. So, I spent a lot of time searching up and down the East Coast for a financial services agency that would exceed my expectations.

Time after time, I met with recruiters from financial services firms and was left feeling unimpressed. The companies were unable to truly differentiate themselves from each other in the marketplace, so I continued looking elsewhere.

**My search ended closer to home than I anticipated.** I am in a golf league in Wilmington, Delaware and while attending a dinner, I met Karen Poore, a Senior Partner at Creative Financial Group. After talking over the course of the evening, she suggested I meet with a member of the recruitment team to gain a better understanding of what CFG had to offer.

**You know when you know.** It did not take long for me to realize that CFG was the agency that had the kind of people I wanted to work with and the career path I was looking for. **CFG offered:**

- A team approach
- Mentorship
- Opportunity for growth
- Continuous training

All of these helped me make my decision. Additionally, I could see a career path that has the potential to lead to high levels of success. What stood out for me most was the way all Associates and Partners are advocates for their clients and truly believe in what they do.

I found the exceptional financial services agency I was searching for. As a new agent, while building my own business, I have even been exposed to all types of clients and situations ranging from smaller, individual and family planning to business and estate planning, and executive compensation plans. While I do not have the knowledge to be an expert in these fields yet, I am learning from the exposure and I can see how working with our internal experts adds tremendous values to our clients.

My mentor, Karen Poore, a Senior Partner CFG, is incredibly successful and has quickly become the key to my success thus far. I have learned and grown from watching her interact with her clients and by asking for her input. We work together on cases for both her clients and mine. After each of my appointments, we discuss what I did well and what I could change or improve upon. It is great to receive constant coaching from someone who is successful and genuinely cares about my future growth.

I am thrilled to be one year into the business and already half way through earning the CFP (Certified Financial Planner) and ChFC (Chartered Financial Consultant) designations.

By working with Karen and others at CFG, I plan to have a long and successful career here.

**For more information, please contact Jaclyn Bradley, Recruiting Director  
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