

An Inside Perspective:

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With 16 years of experience in the financial services industry, making a change seemed almost impossible. In reality, it was the best thing I ever did not only for me but also for my family and clients.

Like so many other financial advisers out there, I was a lone ranger.

I was successful, but it certainly wasn't always easy. Finding time to prospect, build relationships, close new business, process paperwork and maintain existing relationships was a constant struggle. I could do it, but admittedly there were opportunities that I was unable to maximize simply because I couldn't do everything by myself. I often thought of moving my business to a new agency but figured the grass couldn't possibly be greener on the other side.

One event in history changed everything.

When the terrorists attacked New York City, Washington, D.C., and Pennsylvania in 2001, my career went from challenging to extremely difficult in a split second. My business began going backwards instead of moving forward. With a downturn in the economy, no one was buying. Period. I knew I had to make some changes. I wanted to stay in the same industry but needed to find a way to work smarter. I wasn't sure what that meant. My search began.

If I was going to make a change, the new firm had to be a perfect fit for me, for my family and for my clients.

As fate would have it, my manager made the announcement he was transitioning his business to a new agency – Creative Financial Group. He was retiring from being a manager because he wanted to create the life he craved. My former boss spoke highly of the people and possibilities CFG had to offer. His news sparked my interest. After all, someone I trusted and respected chose CFG. That said, I had a lot of unanswered questions. What would entice someone make a change that late in his career? What made CFG different from the other agencies out there? The answers were definitely worth looking into.

It took me six months.

My research and exploratory process took half a year. I attended numerous meetings and events at Creative Financial Group in order to get a feel for what type of agency they really were. The senior partners were extraordinarily impressive. The environment felt "right". Interestingly enough, my final decision was based upon CFG's philosophy of focusing on unique abilities while working in a team environment. This was what I was searching for. After my transition, I was catapulted me into new levels of success.



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

Success is much higher when you are operating solely in your area of expertise. CFG has the ability to put you in a team that allows you to maximize your unique talent.



This innovative way of working has opened up so many doors for me. My team has thousands of people that need help (identified through our team environment and cross-selling).

The greatest challenge anyone in our industry faces is finding new clients; now, I don't have that problem. We have so many opportunities.

Nine years later, I am thriving and doing what I love.

Creative Financial Group's team structure allows me to focus on my unique abilities. I'm a relationship manager and I like taking care of people. As soon as the internal CFG coaches helped me identify this strong point, I became part of an existing team that needed someone to specialize in building and maintaining relationships. While I was doing what I did best, other members of my team were up-selling accounts, prospecting and closing business. My business continues to thrive because I am able to do what I enjoy.

A few thoughts for the skeptics.

There are two questions I'm always asked: "How do you like working in a team environment?" and "Was it difficult to transition your clients?" Let me share my thoughts with you.

How do I like working in a team environment?

Working in a team environment is one of the biggest mental challenges an experienced financial professional has to overcome when considering working with CFG. After all, we are trained to do everything ourselves. In my opinion, the intellectual capital the others on my team bring to the table is unparalleled. Working in a team environment allows me to focus on my unique abilities which has significantly increased the opportunities available to me and my clients. This environment also allows me to spend more time with my family. It's a win-win.

Was it difficult to transition my clients?

Yes, but not because of CFG. I made the mistake of relying on too many other people. My advice to you is to make sure you have a game plan that makes it simple and strategic to transfer your clients before you make a change. Set the right expectations for your clients. Get your commitments in place so that on day one you can hit the ground running and you won't have to look back.

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