ACCELERATING SUCCESS

The financial advisory business is an emotional one, fraught with rejection. It can be incredibly powerful for an advisor to have a coach – an unbiased third-party who is not emotionally invested in the practice – ask tough questions, listen carefully, and guide the advisor work toward his or her full potential. At Legacy, our Growth Coaching delivers results.

"A really good coach will let you be vulnerable but will not let you stay there. It takes a talented, caring, and empathetic person to bring you to those difficult places and then help you rebuild. Not only would I not have had the success in my business but, mentally and emotionally, I would not have gotten through 2020 without Todd Fithian."

- Charlene Quaresma, she/her
Wealth Management Advisor and Director
Northwestern Mutual
Portland, Oregon

LEGACY

THE CHALLENGE

In March 2020, Wealth Management Advisor Charlene Quaresma had goals – big goals. But she was handling more than her business. She had just lost her home to a flood, Covid-19 was spreading across the nation, pandemic lockdowns had begun, global stock markets were plummeting, twenty-three of clients lost their jobs, her staff was stressed, and everyone was looking to her.

Charlene needed to find a way to move toward her personal and professional goals despite the devastation around her. She turned to her coach, Todd Fithian.

THE SOLUTION

Charlene and Todd began working together in November 2019.

They started by identifying the core values that would guide her practice – curiosity, candor, empowerment, purpose, and charisma – as well as the changes that would be to strengthen the practice.

As challenge after challenge was thrown at Charlene, she brought them to Todd, he listened and asked crucial questions. He challenged Charlene and encouraged courageous conversations.

"Todd cared about me, but he was not emotionally attached to my business. He let me process the darkness that was all around me, but he also remined me that I was resilient and capable. He helped me see the summit I was capable of reaching," Charlene said.

During 2020, Charlene prioritized her time in new ways and refined how she would prospect and serve clients. She expanded her joint work and continued to build a strong support team that included a lead advisor.

Culture is a priority for Charlene. Her team shares her values and their voices help shape the practice. To ensure everyone shares the same vision, Charlene's staff attend some coaching sessions. In addition, Todd meets with team members individually so the team can identify issues and resolve them quickly.

THE RESULTS

Despite the harrowing events of 2020, Charlene's production almost doubled. She reached the pinnacle of success at Northwestern Mutual, advancing from Lives Leader Summit Qualifier to first-time Forum Qualifier, and became a keynote speaker at the company's annual meeting. In 2020, Charlene:

- Qualified for Forum
- Won the Master Achievement Award
- Earned the new client bonus with 68 new clients
- Built premium to $592,000
- Brought in $10 million in AUM

Having a great coach is like having a personal trainer, according to Charlene. It's like bootcamp. Your coach holds you accountable and every repetition makes you stronger.

LEARN MORE ABOUT LEGACY

Legacy helps Advisors grow their business. Its flagship Advisor Growth Coaching program helps Advisors accelerate their progress, and create the clients, the business, and the life they want. You can visit our website at www.think-legacy.com, give us a call at 1-888-649-4591.