HOW WOMEN MAKE IT HAPPEN

Women's History Month celebrates ceiling-shattering women of the past, as well as the empowerment of women in the present. In recognition of the month, we reached out to some of our Financial Representatives, to shed some light on how they make it happen: in their businesses, in their lives, and for their clients. We also wanted to find out what motivates Financial Representatives to keep approaching their work with such a high level of commitment and integrity every day. Some commonalities emerged along with some illuminating insights.

FORTUITOUS BEGINNINGS

One may think that people who get into the financial services field have always wanted to do so. Not the case. In fact, many of the Financial Representatives we spoke with have a creative orientation, having studied fields like languages or art history. For example, Amy Lampert of WomensWorth.com in Needham, Massachusetts originally wanted to be a French teacher, but found no open positions at the time. So, she went into financial services.

Once there, Lampert found that the traditional firms were a poor fit for advising consumers, especially women "who are far more interested in security and preserving their wealth while they are building it." Similarly, Andrea Nameche of Lifetime Financial Growth in Columbus, Ohio was a literature and art history major with a creative bent who found her way into insurance straight out of college because the field held more meaning than her other consideration: computers and technology. It's almost as if this inherent creative orientation and holistic thinking ability gives our Financial Representatives greater insight into how to best help clients.

CLOSE COMMUNITIES

Community involvement is something that seems to be decreasing these days, for various reasons. But Financial Representatives seem to put an emphasis on creating and contributing to their communities, which facilitates mentoring opportunities and builds stronger relationships. Nameche is involved with the National Association of Women Business Owners (NAWBO) and Executive Women's Golf Association (EWGA), along with her neighborhood association, for example, while Susan Glusica of Libelle Prosperity Solutions in Pine Bush, New York runs Mastermind groups and learning workshops. For her part, Karen Jessey of Strategic Wealth Partners in Greenwood Village, Colorado is "focused on giving back through volunteering and monetary donations."

CRITICAL MISSIONS

People and companies talk a lot about mission and mission statements. But it's something else to live a mission. This seems to come from having found a greater sense of meaning, which kindles a sustainable fire of motivation. "Being a financial representative is all about leaving a legacy of significance," says Glusica. Similarly, Lampert emphasizes her "mission of empowering women to become masters of their own financial destinies." Klara Muratova of Forest Hills Financial Group in Forest Hills, New York echoes the sentiment, saying her motivation comes from knowing she has people in her "life whose well-being is important to me."

FINDING REALIZATION

Yet another theme that emerged in our exchange with Financial Representatives was how the most successful clients are the ones who are most engaged in the process. While each client has unique needs, and requires a plan to be tailored accordingly, successful clients share strikingly similar characteristics. Lampert cites "self-awareness and a desire to learn in a comfortable atmosphere," while Nameche points out her most successful clients "want a coach to guide them, but they understand that they are the ones who make the plan successful."

LIVING CONFIDENTLY

Finally, it surprised us to find how well the Financial Representatives we spoke with instinctively understood what we found when conducting The Guardian Study of Financial and Emotional Confidence™: The model behaviors of financial and emotional confidence are real and include proactive engagement with financial concepts and products. Adapting a thought from Glusica, "There is no such thing as work-life balance. It's about harmony and flow." That really says it all.

SOURCES:

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